

# Onboarding Checklist for Supervisors

The following tasks should be completed for all new employees joining your team. [Additional areas to consider](#) should also be reviewed and incorporated if they pertain to the new employee's role.

## Onboarding Tasks

### BEFORE THE EMPLOYEE'S FIRST DAY

- Email the employee** to officially welcome them to Carnegie Mellon, after confirmation of acceptance ([Supervisor Welcome Email Templates \[doc\]](#))
- Prepare the employee's first-week agenda** and set up or add them to calendar invitations for any meetings scheduled. Send the schedule to the new employee by email the week before their hire date so they know what to expect during their first week ([Onboarding Schedule Template \[doc\]](#))
- Send an announcement to the department/college/division** welcoming the new employee ([Department Announcement Templates \[doc\]](#))
- Set up the new employee's workspace** with appropriate technology and supplies:
  - Desk/chair or other relevant furniture
  - Computer and Accessories – make sure to consider any preferences or accommodations that have been discussed with the employee
    - CMU-issued computer/cords/charger
    - Docking station
    - Desktop screen(s)
    - Mouse/Keyboard
  - Phone
    - Phone Number
    - Desk phone
    - Voicemail Instructions
  - Office Supplies
    - Pens/Pencils
    - Highlighters
    - Notepads and/or sticky notes
- Set up the new employee's computer**
  - Software needed for the new position
  - VPN
  - Shared Server
  - Email desktop app
  - CISCO Jabber and/or the department's preferred communication app
  - Connect to department printers/scanners
- Have their Andrew ID added** for building access
- Identify a peer team member** whom the new employee can ask for support if you are not available.

### EMPLOYEE'S FIRST DAY

- Greet the employee** at the designated time/location
- Review onboarding agenda** and provide a printed version for easy reference
- Introduce employee to team** members and make sure to identify who can be their point of contact if you are unavailable (peer team member)
- Provide a tour** of the work location, checking to make sure their new ID card is correctly set up for access where necessary:
  - Kitchen
  - Restroom
  - Mail area
  - Team members' workspaces
  - Office Supplies
  - Printer/scanner
  - Conference rooms
- Check-in with the employee** at the end of the day to answer any outstanding questions

### EMPLOYEE'S FIRST WEEK

- Provide Position Overview** (Meeting + Relevant Resources Review)
  - Review position description
  - Review initial job assignments and training plans
  - Review work schedule
  - Review key meetings/events (e.g. 1:1, staff, and divisional meetings)
  - Discuss the performance management process, expectations and goals
  - Identify key contacts outside of the team
  - Discuss how their role fits within the team and college/division
- Provide Team Overview** (Meeting + Relevant Resources to Review)
  - Management style (e.g. what's helpful for the employee to know about you, what are your communication preferences, what can the employee expect from you, what characteristics do you have that might help the employee work successfully with you, how are decisions made)
  - Department culture (e.g. how the team communicates, dress code, typical hours, time off requests)
  - Strategic plans, goals and objectives
  - Overview of roles and responsibilities within the team
  - Safety/emergency protocols (fire escape plan, automatically registered for *Alert Now*, etc.)
- Provide Department Overview** (Meeting + Relevant Resources to Review)
  - Organizational chart of the department
  - Department processes/procedures (e.g. chain of approval, communication/branding, making purchases, securing a conference room)
  - How the department fits within CMU's organizational structure
  - Key leadership and contacts
- Send an eCard** to the employee in [CMU=You](#) to welcome them to the team
- University Policies and Procedures** (Relevant Resources to Review)
  - [Staff Handbook \[pdf\]](#)
  - [Equal Opportunity/Affirmative Action/ADA](#)
  - [Child Protection Policy](#)
- Add the new employee to relevant calendar invites** beyond the first week and distribution lists to ensure they are included in future communications and invitations
- Ensure employee enrolls in the upcoming [New Hire Orientation](#)**
- Check-in with the employee** at the end of the week to answer any outstanding questions

**If your employee has a flexible work arrangement, ensure that it is properly documented in Workday.** For more information, please visit the [FWA webpage](#) for supervisors or contact your [HR business partner](#).

### EMPLOYEE'S FIRST MONTH

- Meet with new the employee** at the end of the first 30 days
  - Discuss initial experiences, obstacles, and progress made
  - Provide feedback and solicit feedback
- Check in with their peer team member** to see how things are going and identify areas that need additional attention to complete their training
- Provide resources for any questions** or concerns that have been identified
- Ensure any mandatory trainings have been completed**
  - Preventing Workplace Harassment
  - Position-specific trainings

### EMPLOYEE'S FIRST THREE MONTHS

- Familiarize yourself with the Provisional Review Period process in Workday** by reviewing the [Provisional or Probation Period Reviews section](#) of the [Performance Management website](#) for information on the provisional review process in Workday.
- Complete the three-month provisional review period check-in in Workday.** For information on how to do this, review the [Provisional Period Review System Guide \[pdf\]](#) or check out the [on-demand video](#). Schedule a conversation with your HR business partner if you have any concerns regarding their performance. When ready, schedule a time to discuss with your employee utilizing the [Provisional Period Discussion Guide \[docx\]](#).
- Establish a plan** for professional development

### EMPLOYEE'S FIRST SIX MONTHS

- Complete the 6-Month Provisional Review in Workday.** For information on how to do this, review the [Provisional Period Review System Guide \[pdf\]](#) or check out the [on-demand video](#).
- Agree to a set of goals** to work toward for the first staff performance review

## Additional Areas to Consider

The following topics and tasks should be reviewed to see if they apply to the new employee's position. Relevant tasks should then be incorporated into the above sections based on when they need to be completed. Some may additionally need to be incorporated into the employee's first-week agenda.

### SUPERVISOR RESOURCES

- Train on time and time off approval in Workday
- Train on other applicable Workday processes/approvals
- Review [Supervisor Resources](#)
- Enroll in Staff Supervisory Awareness Program in [FocusU](#)

### TRAVEL

- Review travel policies and procedures for the department
- If frequent travel is a requirement of the job position:
  - Enroll the new employee in the *Defensive Driving Class*
  - Discuss the Travel Pcard Program and complete the Purchasing Card Employee Cardholder Exception Agreement – Travel
- If the new staff member will be traveling or conducting business internationally:

- Enroll in the *U.S. Foreign Corrupt Practices Act* training in [FocusU](#)
- Review the international travel benefits process

### DEPARTMENT SPECIFIC TASKS/MISC.

This section should be updated to reflect any onboarding tasks that are specific to the department so that they can be easily incorporated as new employees are hired. Examples of these types of tasks are listed below.

- Provide access and training on additional systems specific to the department (i.e.: S3, Oracle, Data Warehouse)
- Go over any applicable allowances or department benefits
- Sign the new employee up for relevant memberships
- Order Business Cards
- Give keys to areas they need access that cannot be accessed with an ID Card