

Employee On-boarding Checklist

Employee Name:

Employee ID:

Employee Internet ID:

Employee Job Classification & Employee Group:

Employee Manager:

OFFER ACCEPTED

TASK	RESPONSIBLE	COMPLETED
Send signed/accepted offer letter to HR consultant and sph-hr@umn.edu	Supv/Unit	
Inform New Hire that start date is contingent upon successful completion of a background check	Supv/Unit	
Initiate background check	SPH HR	
Notify supervisor once background check is completed	SPH HR	
Enter appointment into Peoplesoft and confirm entry with unit	SPH HR	

NEW HIRE PREPARATION

TASK	RESPONSIBLE	COMPLETED
Communicate with colleagues about the new hire; send email announcement or set up meet and greet per division/unit customs	Supv/Unit	
Send welcome email to new hire with 1) I-9 employment verification instructions and link (Must be completed on or before 1st day of work), 2) email/internet ID initiation instructions, 3) if applicable request proof of degree and/or proof of resignation from previous employer	SPH HR	
Prepare documents for new hire: onboarding schedule, add employee to org charts and employee lists	Supv/Unit	
Schedule employee's first day: time to get U card, meeting with HR/Payroll, intros to other employees, meetings with important contacts, tour of office, and welcome lunch (not to be paid with University funds)	Supv/Unit	
Set up new hire's office: clean work area, place office supplies, keys, business cards, phone installation, order computer	Supv/Unit	
Building access & keys: obtain keys if needed	Supv/Unit	
Set up IT access: enterprise wide system request, shared drives, access requests, set up printer, scanner, copier etc. (HRTS4, Peoplesoft, OIT Data Request Form, eRA Commons if applicable)	Supv/Unit	
P-card: Notify finance if new hire will need a P-card. Supervisor may schedule training for P-card in advance	Supv/Unit	
Send office location and phone number to local payroll admin or sph-hr@umn.edu , to be listed in directory	Supv/Unit	
Create a list of employee training required for the job (example: System access training, HIPPA/FERPA/Prevention of Sexual Misconduct etc.)	Supv/Unit	
Visit What to Expect on the Office of Human Resources website for a New Employee Conversation Guide	Employee	
For foreign nationals - send instructions re: ISSS and Social Security Administration	SPH HR	

FIRST DAY

TASK	RESPONSIBLE	COMPLETED
Office Orientation: introductions, building/floor tour, emergency procedures for area/office, what to do in a snowstorm (essential employee), provide department or center-specific materials, provide keys and/or door access codes, mailbox location, supply/copy room, restrooms, kitchen, email set up, calendaring. See Getting Started from OIT: https://it.umn.edu/getting-started-guide	Supv/Unit	
Explore and learn how to manage U information technology by visiting OIT: https://it.umn.edu/self-help-guide/new-staff-start-using-technology	Employee	
Center/Department orientation: department policies / procedures, department dress norms, lunch/break policies, time off requests, mail, phone, garbage pick-up, provide org charts, department phone lists	Supv/Unit	
Job Orientation: position description/expectations and standards, discuss performance appraisal process (PAT system), and employee's probationary period where applicable	Supv/Unit	
HR/Payroll Orientation: 1-9 (Must be completed no later than today or the employee may not begin work), benefits, direct employee to U card office (Ucard is required for bldg access and is to be worn at all times), my (W-4, direct deposit, vac/sick reporting), university calendar/holidays, parking and transportation info, reminder that they have 30 days to elect benefits, wellbeing program, direct to employment rules or contract	SPH HR	
Complete Employee To Do list on the HR Orientation: New Employee Checklist received from SPH HR	Employee	
Foreign Nationals - provide time to go to ISSS and the Social Security Administration Office - schedule appointments as necessary	Supv/Unit	

First Week

TASK	RESPONSIBLE	COMPLETED
Schedule check-in with employee to answer questions and see how they are settling in to their role	Supv/Unit	
Review information and resources in the welcome email from the U Office of Human Resources	Employee	

First Month

TASK	RESPONSIBLE	COMPLETED
Complete required employee trainings: COVI-19/HIPPA/FERPA/Data Privacy/Prevention of Sexual Misconduct etc.	Employee	
Schedule mid-point probationary review, depended on the job classification (probationary periods for CS/LR can be 6 to 12 months (CS employees require 1 written and 1 verbal review)	Supv	
Invite employee to monthly SPH New Employee Orientation	SPH HR	

Third Month and Beyond

TASK	RESPONSIBLE	COMPLETED
Send new hire survey to employee	SPH HR	
Staff (P&A, Civil Service, and Labor Represented), expect to receive an email 3-6 months after your start date, "Effective Performance Management Begins with Great Goals"	SPH HR, Supv and Employee	