Pre-Boarding Checklist

The checklist below will guide you through suggested key tasks to complete before your new hire's first day. You may also want to review the list in partnership with your HR representative and other department administrative contacts to determine who will complete the tasks. You should skip steps that aren't applicable and add in those unique to your unit.

Employee Name:	Title:	Hire date:
Department:	**Supervisor:**	**Buddy:**

Establish a Point of Contact

*Remote employees will have meetings virtually. Hybrid employees will have a mix of in-person and virtual meetings.

- ☐ Determine who should be the point of contact for your new hire during the pre-boarding timeframe.
  - While the reports-to manager should have some contact with the new hire before their arrival, we recommend also choosing a point of contact for questions during the pre-boarding period. The point of contact should be the person who best knows your department's and the university's onboarding practices.
  - Point of contact will be ___________________________
- ☐ As soon as the new hire has accepted their offer, send them an email that contains:
  - A note of congratulations and a warm welcome to the team
  - The name and email of your established point of contact (copy the contact on the email, too!)
  - A reminder to log into their PageUp onboarding portal to complete pre-boarding tasks
    - Login link
  - Links to relocation resources, if applicable.

Administrative

- ☐ Create a transition plan for the new employee and those currently handling the tasks of the position. Define a timeline for how each task will transition to the new employee, who will be responsible for training, and who will communicate the plan to departments and colleagues across campus. A clear plan will set the expectations for the employee and assist them in being successful.
- ☐ Create a schedule for the new hire's first week to two weeks, appropriate to the position. Consider including:
  - Supervisor check-in meetings*
  - Welcome event/activity with the team (see "Welcome Plan" section below)*
  - Meeting to complete I-9 and any other outstanding administrative tasks
  - Meeting with IT representatives to set up equipment/software and receive any department-specific instructions
  - Structured time with supervisor/HR rep/others involved in training*

- Meetings with teammates and stakeholders that the new hire will work with regularly*
- New Employee Orientation*

- [ ] Add the new employee to departmental calendaring systems, shared drives, and give access to other resources that might help them become familiar with the unit before they arrive.
- [ ] Update internal communications, distribution lists, email lists, organizational charts, and other communication channels with the employee's contact info. If remote or hybrid, communicate with others that will be their work mode.

Technology

- [ ] Get the employee's desk phone set up if in person or hybrid. Order a cell phone, if applicable to the position.
- [ ] Order employee's computer and other equipment.
- [ ] Request system accesses that the employee will need to perform their job.

Workspace

- [ ] Order keys and security codes, if applicable to the position.
- [ ] Order nameplate, nametag, and/or business cards, if applicable to the position.
- [ ] Prepare the employee's workspace: set up, then make sure it is clean and organized. If working fully remote, determine what items need to be supplied/ordered.

Supplies

- [ ] Request procurement card, travel card, etc., if applicable to the position.
- [ ] Order uniforms, if applicable to the position.
- [ ] If the employee has requested workplace accommodations, arrange for them in advance, if possible.

Work Assignments

- [ ] Plan initial assignments. Be sure the employee has the tools and information needed to complete their first assignment successfully. This will set the tone for productive supervisor-employee interactions to come.

Welcome Plan

- [ ] Designate someone from the department (other than the supervisor) as a "buddy" for the new employee. A buddy serves as a single point of contact for basic questions and guidance for getting oriented in the department. This is different from the pre-boarding point of contact.*
- [ ] Plan a get-together, such as a coffee break, lunch, or meet and greet, to welcome the new employee as appropriate to your workgroup. This could be virtual for remote hires.
- [ ] Plan your schedule so you can spend time with your new hire on their first day. We recommend spending time with them at the beginning and the end of the day.*

Communications

- [ ] Coordinate with the onboarding point of contact to call the employee a day or two before their start date to answer any remaining questions and to share first-day information (where to report, what time, how to dress, etc.)
- [ ] Send out an announcement to welcome your new hire into the organization **before the new hire's first day.** Consider including:

- Name
- First day on the job
- Job title
- Where they worked before joining your team. (If a new hire, including prior employment information. If an internal transfer or promotion, provide information on their university career).
- Reporting structure information

Other

- ☐ ____
- ☐ ____
- ☐ ____
- ☐ ____
- ☐ ____
- ☐ ____