MANAGER ONBOARDING CHECKLIST

PRE-ARRIVAL

Work area

☐ Approve online job offer or job transfer for new employee
☐ Schedule staff orientation session for new employee through Workday e-learning
☐ Contact IST or local IT Group to set up:
   • Email account
   • Telephone extension number and temporary password for voicemail
   • Set up system and/or area database access (i.e. SharePoint, area shared drive, new employee’s personal drive, printer access, Outlook Calendar set-up)

☐ Set up work area:
   • Clean out desk/drawers
   • Set up computer
   • Order additional furniture as needed
   • Order office supplies as needed
   • Have Key Control form completed and ready on desk

☐ Gather vital reference materials
   • List of websites for UWaterloo white pages, voice mail and email instructions, job description, relevant staff policies, campus map, first day’s calendar of events.
   • Update and print out staff list and area organizational chart (if available)

Communications

☐ Welcome email, letter or telephone call to employee after offer is accepted.
   • Provide contact information for Human Resources (hrhelp@uwaterloo.ca or x35935) and encourage new employee to ask questions prior to start date by email or phone
   • If employee is coming from outside of Ontario, advise employee to consult with Human Resources prior to start date to review provincial health insurance and/or University Health Insurance Plan (UHIP) eligibility requirements

☐ Email to co-workers and key contacts announcing start date of new employee

☐ Email/call new employee again, a day or two before start date (see Orientation Schedule Template on the Post Hire web page):
   • Provide location and time to meet for the first day
   • Provide them with a campus map
• If purchasing a parking pass (advise employee to bring valid vehicle ownership) or advise them of the Grand River Transits corporate transit pass available through Parking Services
• Confirm all Workday onboarding processes are completed
• Advise the employee about department dress code and culture
• Ask if they have any other questions

Schedule into the employee’s Outlook Calendar for:

☐ The first day
  • Visit Parking Services
  • Key Control office
  • Building Tour
  • Various quick one-on-one meetings with area co-workers
  • End-of-day re-cap meeting

☐ Through the first week
  • Visit WATCARD office
  • Various one-on-one meetings with area key contacts
  • Campus Tour through Visitor’s Centre
  • Completion of the University of Waterloo mandatory training
    o Employee Safety Orientation
    o Workplace Violence Awareness
    o AODA
    o WHIMIS 2015
  • Conduct job description, initial goal setting for first 60-90 period with identification of ‘quick wins’ and training and development planning
  • Review OHD courses
    o OHD strongly recommends all new regular employees complete the following workshops - Integrity Matters, Exceptional Service, Principles of Inclusivity, Principles of Genuine Leadership
  • Schedule probationary review meetings at three and six months, as applicable
  • Assign someone in the department to be a peer support for the first 2 weeks
  • Schedule the new employee’s attendance at UWaterloo’s orientation sessions
  • Orient employees to job tasks and identify goals for the first month

ARRIVAL

☐ Give a warm welcome and discuss the plan for the day
  • Follow the time-table set out on employee’s Outlook Calendar

☐ Introduce them to a peer support that has been assigned to them

☐ Give them updated Org chart for reference
☐ Tour the employee’s assigned work space, department and building and introduce them to other staff members

☐ Explain where rest rooms, break areas and Food Services areas are located

☐ Take new employee to lunch if appropriate

☐ Provide required Keys’ Request form and security key fob/codes (if required) and direct/lead to Key Control

☐ Review your department’s policies and procedures including:
   • Working hours (flex time, overtime, absences from work, booking vacation)
   • Telephone, email, Internet use
   • Dept. organization (where files, storage, etc. can be found/kept)
   • Dept. resources (staff listings, Safety Board information, first aid kit location, etc.)
   • Staff meetings
   • Confidentiality — obtain signature on confidentiality document, as applicable
   • Links to Human Resources, University resources
   • Stat Holiday, academic holiday schedules where applicable
   • Key UWaterloo policies affecting the Dept., the employee and the job
   • University communications (Daily Bulletin and mass emails)

ONBOARDING

First week

☐ Review employee work area to ensure equipment and supplies are working and in place

☐ Visit WATCARD office to obtain staff the WATCARD

☐ Set up a brief meeting with the employee to review:
   • The first week’s activities and schedule
   • Orient employees to job tasks and identify goals for the first month
   • Establish an initial work plan that encompasses the first three to six month period including identifying “quick wins”
   • Discuss learning and development needs in relation to the initial work plan and identify how those needs will be met
   • Discuss the probationary process and how and when performance will be assessed (a quick overview of the Performance Appraisal process)
   • Review job description, key duties and initial job expectations including:
     o Policies
     o Procedures
     o Key stakeholders

☐ Schedule a meeting with the new employee to talk about your leadership style, lines of communication, decision processes, etc.

☐ Review Occupational Health and Safety checklist with new employee
- Schedule meetings with other stakeholders (Colleagues, support staff, RA/TAs, Visiting Profs, Directors/Managers of Centres/Institutes/Schools, etc.) within the first month
- Introduce the new employee to senior leaders and Faculty when applicable
- Organize job specific training

**First month**

- Meet with employee to review progress on the initial work plan. Provide relevant feedback on performance to date
- Follow-up on scheduled meetings with other staff members, profs, or other stakeholders to ensure they are occurring
- Follow-up on any questions the employee has regarding the University and refer them to the appropriate resources
- Review and follow through on any learning and development activities agreed to earlier
- Continue job specific training
- Ensure University mandatory training has been completed

**Three months**

- Prepare for probationary review for six month probationary employee, as applicable
- Meet with employee to review progress on the initial work plan. Provide any relevant feedback on performance to date. Ask the employee how they feel about their new job and connections with work team. Establish work plan and set goals for next three to six month period.
- Revisit performance standards and work rules/ethics/policies/culture
- Continue job specific training and begin development planning discussions

**Six months**

- Conduct probationary review meeting for six month probationary employee, as applicable
- Review job performance and goals and identify accomplishments and challenges
- Establish work plan and set goals for next three to six month period
- Continue job specific training and development planning
Nine months

- Prepare for probationary review for twelve month probationary employee, as applicable
- Review job performance and goals and identify accomplishments and challenges
- Establish work plan and set goals for next three month period

Twelve months

- Conduct probationary review meeting for twelve month probationary employee, as applicable
- Review job performance and goals and identify accomplishments and challenges. Establish work plan and set goals for next twelve month period
- Revisit performance standards and work rules/ethics/policies/culture
- Continue job specific training and development planning – review OHD training courses completed