

## **SUPERVISOR: MSASS Onboarding Checklist**

### **BEFORE THE EMPLOYEE'S START DATE**

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**INTENTION:** *This is a welcoming work environment with informed colleagues and a fully-equipped work space; new employees feel “settled in” on their first day.*

#### *HR:*

- HR will generate offer letter and set start date.
- MSASS HR will identify and orient an MSASS ‘buddy’ for the new hire and put the two in contact.
- MSASS HR will email the new employee to welcome them, ask for a photo and bio to send to the school, and schedule an HR orientation.
- MSASS HR will email the school about the new hire approximately one week prior to start date.
- MSASS HR will email supervisor and relevant F&A staff about new hire so that equipment purchase/set up, nameplate, keys and other onboarding can occur.
- Ina will create a new file folder in HR Drawer

#### *Supervisor:*

##### **Schedule and Job Duties**

- Email employee to: confirm start date, time, place, parking, dress code, equipment needed.
- Plan the employee’s first assignments.

##### **Socialization**

- Set up meetings with critical people for the employee’s first few weeks.

##### **Work Environment**

- Clean the work area, and set up cube/office space with supplies.
- Email Bill Haller to order office or work area keys (person needs employee ID; in advance only with internal employees).
- Email Lauren Welch to order business cards.
- Add employee to relevant email lists by contacting Karoline Kramer.

##### **Technology Access and Related**

- Contact Eileen Connell to order technology equipment (computer, etc.) and software.
- Email Michael Olenik to arrange for phone installation.
- Email Karoline Kramer to update MSASS directory.

##### **Training/Development**

- Arrange pertinent trainings required for the job. If you need help identifying trainings, speak to your department administrator and/or members of finance & administration.

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### **FIRST DAY IN OFFICE**

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**INTENTION:** *The employee feels welcomed and prepared to start working; begins to understand the position and performance expectations.*

*Supervisor:*

#### **Schedule, Job Duties, and Expectations**

- Clarify the first week's schedule, and confirm required and recommended trainings.
- Provide an overview of the functional area – its purpose, organizational structure, and goals.
- Review job description, outline of duties, and expectations with new employee.
- Describe how employee's job fits in the department, and how the job and department contribute to the unit/school/university.
- Review hours of work. Refer questions on policies and procedures for overtime, use of vacation and sick time, holidays, to Melissa Van in HR. Explain any flexible work policies or procedures.

#### **Socialization**

- Be available to greet the employee on the first day or designate someone else.
- Introduce employee to others in the workplace.

#### **Work Environment**

- Provide department or building-specific safety and emergency information.
- Have someone take employee on a school and a possible campus tour.
- Explain how to get additional supplies.

#### **Technology Access and Related**

- Provide information on setting up voicemail and computer.
- Arrange for access to common drives, and coordinate roles and authorizations.

### **FIRST WEEK**

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**INTENTION:** *New employee builds knowledge of internal processes and performance expectations; feels settled into the new work environment.*

*MSASS HR:*

- Schedule time for employee HR orientation.
- In HR Orientation: review school mission, org chart, events & activities, preferred pronouns; trainings & affinity groups, expectations; performance; vacations & absences; HCM, and any HR-relevant knowledge for the role.
- Email employee and supervisor with orientation evaluation process and form
- Schedule photo shoot for website photo

*Supervisor:*

## **SUPERVISOR: MSASS Onboarding Checklist**

### **Schedule, Job Duties, and Expectations**

- Give employee his/her initial assignment. (Make it something small and doable.)
- Debrief with employee after he/she attends initial meetings, attends training, and begins work on initial assignment. Also touch base quickly each day.
- Provide additional contextual information about the department and organization to increase understanding of the purpose, value add to CWRU, goals, and initiatives.
- Explain the annual performance review and goal-setting process.
- Review the process related to the probationary period.

### **Socialization**

- Arrange for a personal welcome from co-workers.

### **Technology Access and Related**

- Ensure employee has fully functioning computer and systems access and understands how to use them.
- Show employee where to access needed information on the MSASS and university websites.

## **FIRST MONTH**

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**INTENTION:** *Employee is cognizant of their performance relative to expectations; continues to develop, learn about the organization, and build relationships.*

### *MSASS HR:*

- Meet with employee and buddy to review first weeks and answer questions.
- Email employee and supervisor about 30-day performance review.

### *Supervisor:*

#### **Schedule, Job Duties, and Expectations**

- Schedule and conduct regular one-on-one meetings.
- Continue to provide timely, on-going, meaningful “everyday feedback.” For suggestions on how to give feedback, ask Melissa Van.
- Elicit feedback from the employee and be available to answer questions.
- Discuss performance and professional development goals.

#### **Socialization**

- Continue introducing employee to key people and bring him/her to relevant events.
- Arrange for employee to take university tour (if not already completed).

#### **Training and Development**

- Ensure employee is signed up for necessary trainings.
- Point out optional trainings and learning opportunities through the Professional Development Center.

## SUPERVISOR: MSASS Onboarding Checklist

### FIRST THREE MONTHS

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**INTENTION:** *Employee is becoming fully aware of their role and responsibilities and starts to produce meaningful work. They continue to acclimate to the environment, functionally and socially.*

*MSASS HR:*

- Check-in with the employee and buddy
- Email employee and supervisor about 60 and 90 day performance reviews
- Diversity360 Training – notify employee of next sessions.

*Supervisor:*

#### **Schedule, Job Duties, and Expectations**

- Continue having regularly occurring one-on-one meetings.
- Meet for informal 60 and 90 day performance check-ins.
- Create written performance goals and professional development goals.

#### **Socialization**

- Have employee “shadow” you at meetings to get exposure to others and learn more about the department and organization.

#### **Training and Development**

- Ask if needed training is completed.
- Provide information about continued learning opportunities including tuition assistance, programs offered by Human Resources, and lynda.com.

### FIRST SIX MONTHS

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**INTENTION:** *Employee has gained momentum in producing deliverables and has built some relationships with peers as go-to partners. Employee feels confident and is engaged in new role while continuing to learn.*

*MSASS HR:*

- Meet with employee and buddy at the end of their structured buddy-relationship. Discuss how things went and what else would be helpful for the employee.

*With Employee:*

#### **Schedule, Job Duties, and Expectations**

- Conduct six-month performance review.
- Review progress on performance goals and professional development goals.

#### **Socialization**

- Create an opportunity for employee to attend or be involved in an activity outside of his/her work area.

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- Invite employee to campus events (such as commencement, summer activities and winter parties), and introduce him/her to others.

## **FIRST YEAR [BETWEEN SIX AND TWELVE MONTHS]**

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**INTENTION:** *Employee is fully engaged in new role – applies skills and knowledge, makes sound decisions, contributes to team goals, understands how their assignments affect others in the organization, and develops effective working relationships. Person has a strong understanding of MSASS’s mission and culture. Employee has gained greater confidence in position.*

### **MSASS HR:**

- Solicit employee’s feedback and suggestions on ways to improve the onboarding experience. Do this one-on-one or with a small group of new employees.

### **Supervisor:**

#### **Schedule, Job Duties, and Expectations**

- Celebrate successes and recognize employee’s contributions.
- Continue providing regular informal feedback; provide formal feedback during the annual review process.
- Have a conversation with employee about his/her experience at MSASS to date:
  - Extent to which employee’s expectations of role and MSASS align with reality.
  - Extent employee’s skills and knowledge are being utilized and ways to better utilize them; what’s working, what they need more of, etc.
  - Begin discussing the year ahead.

#### **Socialization**

- Support and encourage employee participating on either a university-wide staff committee or cross-functional team.

#### **Training and Development**

- Discuss employee’s professional development goals and identify relevant learning opportunities.