



COLLEGE *of*  
CHARLESTON

DIVISION OF  
STUDENT AFFAIRS



# New Employee

## On-Boarding Checklist Template

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## Directions for Division of Student Affairs Supervisors

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### Overview:

Please use the following pages to create an individualized on-boarding checklist for new employees as an addendum to existing College on-boarding checklists provided by Human Resources (HR). The checklist should be used for all new employees in your department, regardless of whether they were previously employed in another department at the College or in another part of the Division of Student Affairs, as each department/office may have unique policies, procedures, or processes.

### Instructions to Prepare Templates:

The new employee's supervisor and the HR liaison should begin using the checklist before the start date. Review and modify the checklist so that it meets your department's needs and the new employee's individual developmental needs (not all items will apply to your department/position). Identify who is responsible for completing each Welcome Item and if there is a target date for completing those items. Place a check mark in the box next to each item once it is complete.

### General Tips:

- Modify individual items in order to match the language and procedures used in your department.
- Review the checklist during regular check-ins to determine how your new employee is progressing. Edit the checklist as needed to meet the needs of the new employee and your department.
- Stay flexible. Sometimes, items are accomplished slightly later than expected. Use the checklist to determine which high-priority items have not been accomplished by each milestone, and schedule accordingly.
- Both the new employee and supervisor should have a copy of the checklist to remain aware of what has been accomplished and what items are on the horizon.

Additional resources for on-boarding new employees can be found on the Division of Student Affairs website (<http://studentaffairs.cofc.edu/about/new-staff-information/>).

TIMELINE	OFF MGR./DESIGNEE	DEPT. LIAISON	SUPERVISOR/DESIGNEE	HR LIAISON	TARGET COMPLETION DATE	COMPLETED	WELCOME ITEM	DETAILS
PRIOR TO FIRST DAY			X				Welcome	E-mails and/or calls from Supervisor
				X			Welcome	E-mails and/or calls from HR Liaison(s)
				X			Welcome	E-mails and/or calls from Dept. Liaison
				X			Schedule HR Orientation	Facilitate completion of employment forms and benefits selection, and orientation session/training; ID card
				X			PeopleAdmin access (if needed)	Dee Cole, Human Resources (access will be given automatically upon hire)
				X			Train MyCharleston	Should happen in technical orientation
	X						Request the person be added to appropriate listserves (Division staff, Dept staff)	
	X						Confirm telephone #, name display and voicemail set up	Check with HelpDesk Telephone Services (x3375); Voicemail set-up info is in campus directory
	X						Request access to any dept. shared computer files and printers	HelpDesk (x3375)
	X						Order Cell Phone (if authorized)	Telephone Services (x3375) & authorization form
	X						Order iPad (if authorized)	Apple in EProcure
	X						Confirm e-mail has been activated	HelpDesk sends email access (x3375)
	X						Order door nameplates	
	X						Order name badge (to wear each day)	All American Awards 843-884-7808
	X						Order business cards	EProcure – Business Cards Express
	X						Organize workspace and supplies	
	X						Arrange for keys and alarm codes	Building/Operations manager for your building
	X						Provide a list/training for finding important information on the CofC website (phone/ e-mail contacts, academic calendar, etc.)	<a href="http://www.cofc.edu">www.cofc.edu</a>
	X						Arrange for cleaning/organizing workspace	
	X						Provide basic office supplies and explain policies and procedures for access/ordering.	
	X						Provide phone directory, set up phone, training for call waiting, messaging, voicemail	Contact telephone services (x3375) for advanced training if necessary
		X					Prepare current employees for arrival of new employees	
		X					Plan time on first day to spend significant portion of the day to help that person transition	
	X					Pick up Student Affairs EVP Welcome materials	Contact Susan Hartman	
		X				Identify possible mentor outside of your department who serves in similar role.	Contact AVP/EVP if need help identifying appropriate staff to serve as mentor.	

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PRIOR TO FIRST DAY			X				Consider a small welcome gift for first day	
			X				Consider methods for introducing to campus community (receptions, drop ins, if applicable)	
			X				Arrange lunch plans for the first few days	
			X				Schedule more detailed Student Affairs tour to meet other staff / department areas.	Division's Social Comm. provides supplemental info. Notify committee chair of start date: <a href="http://studentaffairs.cofc.edu/about/staff-development/index.php">http://studentaffairs.cofc.edu/about/staff-development/index.php</a>
			X				Create a "to do" list for first few days	
			X				Inspect computer station and make recommendations, plan for domain access	Check with HelpDesk (x3375) for software, etc.
			X				Determine which Banner systems will be required and which access forms need to be completed, authorized by AVP and EVP	Arrange for relevant training (some tutorials are on Help and Training tab of MyCharleston)
			X				"	<a href="#">Finance</a> –Matt Nichols (Budgeting/Payroll) <a href="#">SSB Access Form</a> and <a href="#">Index/FOP Form</a>
			X				"	<a href="#">Finance</a> - (Foundation – Tie Smith)
			X				"	Cognos – Mary Person (Institutional Research, Planning, and Information Management)
			X				"	<a href="#">Student</a> - Mary Bergstrom (Registrar)
			X				"	BDMS - (IT)
			X				"	Workflow – (IT)
			X				"	DegreeWorks- (Advising)
			X				"	OAKS (academic workflow) (Teaching, Learning, Tech.)
			X				"	People Admin – Dee Cole (HR)
			X				"	Cognos – Mary Person (Inst. Research/Planning)
			X				"	Student (Registrar)
		X				"	Workflow – Sylvia Burwell (IT)	
		X				"	PeopleAdmin – Dee Cole (Human Resources (access will be provided automatically upon hire)	
		X				"	DegreeWorks - (Advising)	
ADDL ITEMS								

TIMELINE	OFF MGR/DESIGNEE	DEPT . LIAISON	SUPERVISOR/DESIGNEE	HR LIAISON	TARGET COMPLETION DATE	COMPLETED	WELCOME ITEM	DETAILS
WITHIN FIRST WEEK	X						Provide reference materials (handbooks, policy manuals, newsletter, directory, etc.)	
	X						Explain tech support/helpdesk and training	
	X						Explain inter-office mail, e-mail and US mail	
	X						Review Outlook and Calendaring	
	X						Arrange for update of website	
	X						Provide parking information or a visit to Parking Services	Application/assignment
	X						Plan a Tour of Office/Building Areas/Dept.	Copy machine, supplies, equipment, conference rooms, fire exits, coffee, snacks, etc.
	X						Explain location and use of copiers, scanners, networked printers, etc.	Set-up networked printer access
	X						Discuss computer file storage options	Access to shared drives, if applicable
	X						Discuss office filing systems and storage	
	X						Explain functions of others who work nearby	Provide On-call list if applicable
	X						Define environmental effects: Recycling	
	X						Give directions to cafeteria / local dining options	
	X						Discuss break/lunch time schedules for area offices and main desk coverage or check-in	
	X						Provide a telephone/email directory for outside contacts.	
		X					If requested, provide, information about life issues (housing, banking, DMV, daycare, fitness)	
			X				Share helpful webpage resources (division, department, directory, site index, calendars, cultural passport, off-campus email access, etc.	<a href="http://studentaffairs.cofc.edu/">http://studentaffairs.cofc.edu/</a> <a href="http://cofc.edu/directory/">http://cofc.edu/directory/</a> <a href="http://cofc.edu/siteindex/">http://cofc.edu/siteindex/</a> <a href="http://registrar.cofc.edu/calendars/">http://registrar.cofc.edu/calendars/</a> <a href="http://culturalpassport.cofc.edu/">http://culturalpassport.cofc.edu/</a> <a href="http://it.cofc.edu/network/remote/index.php">http://it.cofc.edu/network/remote/index.php</a>
			X				Provide training for basic office questions, procedures (answering phones, FAQs, etc.)	
				X			Review departmental mission and goals and where employee's position fits into department	
				X			Schedule recurring meetings with Supervisor	
			X			Provide an overview of the departmental history and a division organizational chart	<a href="http://studentaffairs.cofc.edu/about/sa-org-chart.php">http://studentaffairs.cofc.edu/about/sa-org-chart.php</a>	
			X			Inspect / recommend changes to office / furniture		

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WITHIN FIRST WEEK			X				Training for Leave Approval/Time Sheets/Leave Records	Tutorial on <a href="http://my.cofc.edu">my.cofc.edu</a> employee tab (bottom right column)
							Explain expectations re: FLSA non-exempt	
			X				Explain how hours are recorded and process of notification if employee is sick or plans for leave	
			X				Explain any shared calendars or shared data drives	
			X				Discuss Department Culture	Awareness of department meeting days, work-load peak/down-times; flexible scheduling, traditional work hours etc.
			X				Explain pertinent institutional policies for FERPA, HIPPA, FLSA, etc.	
			X				Post welcome message to division of welcome with phone, e-mail information, etc. Schedule necessary "get acquainted" meetings with supervisors, peers, key students, key players, etc.	
			X				Explain how much individual autonomy staff members tend to have in making decisions about particular issues	
			X				Explain faculty collaborations if relevant to position	
			X				Explain student organization(s) relevant to position	
			X				Provide profile of student body.	Admissions Quick Facts
			X				Arrange meeting times with contacts in the department within the first week	
			X				Discuss work styles and dress expectations	
			X				Explain safety and emergency procedures; provide access to relevant guidelines/training	
		X				Explain role of student employees and/or graduate assistants in department		
ADDITIONAL ITEMS								

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WITHIN FIRST MONTH	X						Explain institutional policies: accounting, catering, reimbursements, travel, and relevant forms	Explain relevant indexes/accounts
	X						Provide information regarding institutional transportation – rental of vehicles, golf, carts, CARTA bus systems, parking	
		X					Encourage “visible division” and CofC spirit wear	Lands End, CofC Bookstore
		X					Explain parent/family involvement on campus	
		X					Inquire about hobbies and personal interests to help make connections to opportunities within the institution and community for these interests	
		X					Review campus volunteer and local community service opportunities	
		X					Describe opportunities and support for affiliation with professional organizations	
			X				Discuss on-going opportunities for technical training and develop a plan if applicable	
			X				Explain performance review schedule	
			X				Arrange for Purchasing Card and schedule training if authorized	Cheryl Drum (Procurement)
			X				Arrange for Basics of Procurement Training	Purchasing & Supply Manual <a href="http://procurement.cofc.edu/procurement-manual/index.php">http://procurement.cofc.edu/procurement-manual/index.php</a>
			X				List of employee’s committee commitments	
			X				Arrange for intro at Board of Trustees quarterly meeting for employee who is a Director, Dean, Vice President	Elizabeth Kassebaum (x5500)
			X				Explain job-related reports and forms relevant to the position and applicable deadlines	
			X				Explain performance appraisal process	
			X				Schedule time for goal setting and ongoing supervision	
			X				Discuss town-gown issues relevant to position	
			X				Explain student involvement and campus climate	
							Explain institutional and state governance structure	
			X				Review institution mission, division mission, and values, goals, etc.	
		X				Review departmental mission and goals and where employee's position fits into department		

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WITHIN FIRST MONTH			X				Identify role of other institutional units	
			X				Share role modeling / mentoring opportunities	
			X				Explain what type of behavior and involvement students expect from staff	
			X				Review development (fund raising) expectations/activities	
			X				Explain relevant role in assessment for department	
			X				Explain Dept/Division role in College's QEP	
ADDITIONAL ITEMS								
30			X				Complete 30-day check-in & outline plan for next 30 days	See Student Affairs new employee website for sample check-in items. And visit HR's site for additional items: <a href="http://hr.cofc.edu/new-employees/your-first-months---staff/index.php">http://hr.cofc.edu/new-employees/your-first-months---staff/index.php</a>
60			X				Complete 60-day check-in & outline plan for next 30 days	See Student Affairs new employee website for sample check-in items
90			X				Complete 90-day check-in & outline plan for next 120 days	See Student Affairs new employee website for sample check-in items
6 mo			X				Complete 6-month performance review	Refer to EPMS/PeopleAdmin goals
12 mo			X				Complete annual performance evaluation	<a href="http://hr.cofc.edu/new-employees/your-first-year-staff/index.php">http://hr.cofc.edu/new-employees/your-first-year-staff/index.php</a>