



**Manager's Checklist
for Onboarding a New Team Member**

Employee _____ Date of hire _____

If applicable:

Date of Benefits Enrollment _____ Date of Staff Orientation _____

This checklist is designed to assist you in orienting your new staff member to Bentley and to your department. The onboarding process begins during the recruitment process, and may continue well into the first year at Bentley. Most of the items on this Checklist will be completed in the first three months of employment.



Contact New Hire Prior to First day of Employment	Completed
Call to welcome your new hire after official acceptance of job offer.	
Confirm start date/time/location, who will greet them on their first day.	
Suggest typical dress code; inform of any pre-scheduled lunch plans.	
Confirm parking location and need to bring in vehicle registration for sticker.	
Discuss scheduled Benefits Enrollment and Orientation meetings.	
Answer any questions the new employee might have at this time.	
Confirm what name the new hire wants to be known as, and what should appear on the business card.	

Prior To The New Employee's Arrival	Completed
Follow instructions on email from HR representative regarding Onboarding Account Set-up Information, and ensure department's Key User submits form to Client Services to set up new employee account for email account and systems access. (Should be completed at least 72 hours before start date).	
Ensure department's Administrator submits New Hire Move Request form to set up furniture, telecommunications, computer hardware, printer connection, and any other special network requirements, as well as mail services, and campus I.D.	
Arrange for ordering business cards and miscellaneous office supplies.	
Communicate new hire's start date to your department, and share your expectations for their involvement in onboarding.	
Arrange for someone to accompany the New Hire to lunch, whether you, another member of the department, or the whole team.	
Prepare an agenda for the first day/first week or two.	

Schedule training with administrators on department or Bentley specific systems (Ex: Workday Finance , Office 365, etc.).	
Prepare a list of the members (or leaders depending on size) within your department and their general responsibilities.	
Circulate welcome card for department staff to sign.	
Schedule new hire for New Staff Orientation.	
Consider assigning a team “buddy” as an immediate resource for any questions.	

<i>New Employee's First Day</i>	Completed
Make yourself available to greet new employee.	
Introductions to department/tour of department, building, and campus as needed.	
Review onboarding agenda—who they will meet, technology to learn, office procedures, etc.	
Go with employee to their office/work space.	
Review, or arrange for assistance with computer log-in, telephone, printers, or other office equipment.	
Arrange for office supplies and provide keys.	
Review any shared calendars or drives.	
Review My Bentley section of website—what it includes and how to access it.	
Allow time for office set-up, and for time alone to read introductory materials, but ensure new hire is not left alone with <i>nothing</i> to do!	
Add to recurring departmental meetings.	
Arrange to add new hire’s name to website if applicable.	
If new employee is in a union, provide a copy of the contract	

<i>During First and Second Weeks</i>	Completed
Review organizational charts, identifying all key stakeholders.	
Discuss department and division goals and strategy, providing information on key initiatives.	
Review position description, discuss performance evaluation, and begin to share your expectations.	
Review process for requesting time off, and for submitting timesheet.	
Ensure that some work assignments are ready for the new employee, and that a resource is available to train or assist.	
Schedule one-on-one meetings with the other team members. Ask them to provide a short description of their work and how it will integrate with the new employee’s role.	
Request Purchasing and Travel cards as needed, and arrange for training.	
Review performance evaluation process.	
Allow ample time to review significant university policies, and to complete MOAT requirement.	
Allow time to complete online Workplace Harassment Prevention training.	
Encourage employee to become acquainted with My Bentley website, and pertinent departmental information on the shared drive.	
Review campus room reservation system.	

Schedule weekly meeting with new employee to check in on progress; keep a priority until no longer needed.	
<i>During First One to Three Months</i>	Completed
Continue to clarify employee's role and responsibilities, and your expectations.	
Establish SMART goals as first step in performance management process.	
Ask about learning needs, and recommend development opportunities, and create plan to support job specific training needs.	
If new employee supervises others, ensure she or he is regularly meeting with staff one-on-one and as a group.	
Continue to schedule training opportunities for the employee during this time. He or she will have a better start-up experience if the information needed to perform the role is provided over a span of several weeks.	
Discuss new employee's initial experiences and whether they are matching his or her expectations. Identify any concerns the employee may have, and offer what help you can provide.	
Solicit feedback from the new employee regarding how you can help improve the integration experience for the employee.	
Ensure completion of required training.	
Support participation in campus-wide diversity retreat.	

Notes: