New Hire Checklist for Managers

This Checklist is designed to help managers stay organized from offer acceptance to employee first day, while overseeing a holistic onboarding experience through employees' first 90 days

Responsibility | Completed?

One to Two Weeks Prior to Start Date

Purpose*: Communicate, plan and coordinate the details*

○ Send Email to New Hire i.e. welcome, confirm start date/time & location (if applicable). If remote, communicate your expectations about working from home — **Manager** ☐

○ Send an announcement to Department; Communicate new hire's start date to your department, and share your expectations for their involvement in onboarding — **Manager** ☐

○ Managers will receive an email from HR regarding account set up information. Follow the instructions to ensure the department submits the new hire setup request, found by following this link to ServiceNow and searching "New Hire Setup" in the search field. Use the ServiceNow forms when a new Faculty or Staff member has been hired to request a computer, telephone, voicemail, access to a printer, software, application, account, distribution list addition, shared calendar access, painting/patching and furniture requests, assignment of mail stop, physical keys needed, building or room swipe access needed, etc. (Should be completed at least 2 weeks before start date) — **Manager** ☐

○ Create a schedule for first week- team meet and greets/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. Set aside time to introduce or expand upon departmental software, projects, and job duties-invite applicable team members as needed — **Manager** ☐

○ Schedule training with administrators on department or Bentley specific software systems- (i.e. Workday, Office 365, My Bentley) — **Manager** ☐

○ Prepare a list of the members (or leaders depending on size) within your department and their general responsibilities — **Manager** ☐

First Day

Purpose*: Welcome and introductions; create smooth transition; complete required*

○ Introductions to team members (i.e. Via Microsoft Teams, Zoom) — **Manager** ☐

○ Review onboarding agenda—who they will meet during the week, technology to learn, office/team procedures, etc. — **Manager** ☐

○ Review, or arrange for assistance with computer log-in, telephone, printers, or other office equipment — **Manager** ☐

○ Review important department and policies/procedures — **Manager** ☐

○ Remind employee to meet with HR to complete the Form I9 and other important onboarding paperwork — **Manager** ☐

○ Review any shared calendars or drives — **Manager** ☐

○ Make sure to include employee in reoccurring team and department meetings — **Manager** ☐

○ Schedule reoccurring one on one meetings i.e. weekly, bi-weekly, monthly — **Manager** ☐

○ If new employee is in a union, provide a copy of the contract — **Manager** ☐

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First Week

Purpose: Provide employee with important information

○ Review organizational charts, identifying all key stakeholders with emphasis on how your department interacts with other departments — **Manager** ☐

○ Discuss department and division goals and strategy, providing information on key initiatives — **Manager** ☐

○ Review position description, discuss performance evaluation, and begin to share your expectations — **Manager** ☐

○ Review process for requesting time off, and for submitting timesheet — **Manager** ☐

○ Request Purchasing and Travel cards as needed, and arrange for training — **Manager** ☐

○ Arrange to add new hire's name to website if applicable — **Manager** ☐

○ Arrange for ordering business cards and miscellaneous office supplies (if applicable) — **Manager** ☐

○ Confirm that employee has completed Workday onboarding tasks and answer applicable questions or refer to HR as needed — **Manager** ☐

○ Encourage employee to become acquainted with My Bentley website, and pertinent departmental information on the shared drive — **Manager** ☐

○ Informal meeting with employee. Gather employee feedback with regard to first week and determine any other training they may require — **Manager** ☐

Second Week through first 90 Days

Purpose: Assign short term goals; Provide informal feedback to help assimilate further into

○ Continue to clarify employee's role and responsibilities, and your expectations — **Manager** ☐

○ Encourage employee to activate LinkedIn Learning account, view and attend upcoming events (via email & the university calendar) and to be on the lookout of the monthly issues of the Bentley Buzz — **Manager** ☐

○ Encourage employee to learn about other departments (i.e. via reviewing websites and departmental contacts for those you partner with, attending virtual campus events) — **Manager** ☐

○ If new employee supervises others, ensure they are regularly meeting with staff one-on-one and as a group — **Manager** ☐

○ Ensure completion of required training — **Manager** ☐

○ Discuss CAP- Assign short term goals or project to help employee feel productive — **Manager** ☐

○ Solicit feedback from the new employee regarding how you can help improve the onboarding experience — **Manager** ☐

○ Confirm the employee is scheduled to attend New Hire Orientation — **Manager** ☐