

New Hire Onboarding Checklist (for Supervisors)

A comprehensive guide of steps for supervisors to complete before the new employee's arrival and during their first week through first year. Download/print out to go through these items and keep for your records. The department may also have additional checklists specific to the department.

Before the start date

- Process new hire and payroll documents:
 - HR sends offer letter and new hire paperwork to new hires via DocuSign* (I-9, W4, Direct Deposit, Personal Data Statement, etc.) and it is routed to Department HR Super User and Supervisor to sign/review.
 - *If they are an international employee, only the offer letter will be sent in DocuSign and then they must visit the HR office to fill out specific paperwork before they can start working.
 - Department Super User submits EPAF.
 - Notify your Department of New Hire – provide information such as Name, Start date, Job title, brief biography (cc: new employee, if appropriate).

 - Complete ITS Account Request <https://apps.usd.edu/accounts/request/patron/index.cfm> to request a USD account for email/login.
 - Complete ITS Permissions Request <https://td.usd.edu/TDClient/33/Portal/KB/ArticleDet?ID=4571> and request access to applications needed (Banner, Calendar, VoIP Phone, Network Shares, Cognos, D2L, DocuSign, ImageNow, SDezBuy, SNAP, TMA, Xtender, etc.).
- Note:** Access to Email, SNAP, Banner, D2L, etc. will not be available until the EPAF has been processed by HR.
- Develop Welcome Plan
 - Prepare first day/week agenda/action plan for new employee (refer to first day & first week checklists).
 - Make plans for someone to welcome the new employee upon arrival.
 - Schedule meetings with critical people for the employee's first week and add to employee's calendar.
 - Schedule job-related trainings (Banner, etc.) and add to employee's calendar.
 - Update department contact information and Organization chart – with new employee added.
 - Print out position description and department expectations.

 - Prepare Employee Workspace
 - Set up and clean work area and gather basic office/desk supplies.
 - Make sure you have a key for the new employee - order if necessary.
 - Verify working computer - order new computer if necessary.
 - Request Computer Access from ITS at <https://td.usd.edu/TDClient/33/Portal/KB/ArticleDet?ID=490>
 - Complete Printing setup <https://td.usd.edu/TDClient/33/Portal/KB/ArticleDet?ID=40>
 - Clear out voicemail and reset password. (Set up VOiP by completing ITS Permissions Request above).
 - Order business cards, name tag and name plate (if appropriate).

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First Day

- Supervisor/Hiring Manager needs to fill out and sign page 2 of the I-9, include copies of the employee's identification cards (passport, Driver's license, social security card) and return it to the HR office.
- Provide and review welcome plan and new hire packet with employee:
 - Ensure they have received their new hire packet from HR (contact HR if the packet has not arrived yet).
 - Confirm that the new hire received a welcome email from HR with information on benefits enrollment and completing orientation and training requirements.
 - Confirm the date of the *Intro to YoteLife* new hire orientation which is provided in their welcome email. (Supervisors will also be invited to attend *Intro to YoteLife* to meet with their employees during a portion of orientation; watch for an email from Marketing).
 - Provide employee with a departmental org/staffing chart with names and roles.
 - Review outline of the first day/week of employment.
- Introduce employee to the department and their work area:
 - Provide office key to employee.
 - Assist new employee in logging into their office computer/network and review necessary files/drives. Contact IT if they do not have their login information yet/unable to login.
 - Provide an overview of technology and software (email, phone, voicemail, shared drives, calendars, portal).
 - Discuss how to order office supplies.
- Provide a tour of the department/building:
 - Identify restrooms, break/lunch areas, elevators, stairs, emergency exit procedures.
 - Identify photocopier locations and discuss use.
 - Provide a tour of other areas of campus, as appropriate to position, and introduce to key contacts.
 - Review parking information and direct them where to get a parking pass.
 - Take employee to get Coyote Card – go to IT Help Desk in ID Weeks.
- Review the department/USD expectations, policies and procedures:
 - Review office hours, university calendar, holidays, dress code, etc.
 - Review timekeeping process and overtime/comp time (if applicable).
 - Review leave request process and department process for calling in to report absences.
 - Review department specific and USD policies. USD policies can be found at <https://www.usd.edu/policies>
 - Phone and computer use policies: <https://www.sdbor.edu/policy/documents/7-1.pdf>
 - Department Building Emergency procedures (fire, tornado, etc.). USD Emergency Procedures <https://www.usd.edu/administration/university-police/emergency>
 - Weather policy: <https://www.usd.edu/policies/weather-policy>
- Review position description and job expectations:
 - Review employee's position description, work schedule and job expectations.
 - Review job specific user manuals and other potential user manuals for the position (Banner, etc.).
 - Discuss training required for the position and update as necessary.
 - Review probationary period and process (CSA employees only). Once they reach 6 months of employment (1 year for law enforcement CSA employees), they have completed their probationary period which means they have achieved "civil service" status. Contact HR for more details.

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First Week

- Check-in daily to inquire as to how things are going and to answer any questions the new employee may have.
- Make sure all technology is working appropriately (computer, voicemail, printer, software, phone, copier etc.).
- Review Employee Handbook (available in the myUSD portal).
- Review current and cyclical department projects/programs and their role.

First Month

- Employee should have completed benefits enrollment during the first 30 calendar days of employment.
- Ensure employee attends Intro to Yotelife and completes assigned trainings videos from HR if not done yet.
- Weekly or bi-weekly meetings with the employee to review progress and answer any questions.
- Discuss how the department contributes to the USD Strategic Plan <https://www.usd.edu/about-usd/fy26-strategic-plan>.
- Discuss workload levels and any possible training needs.
- Review job description and the performance review process and develop short term performance goals.
 - CSA - Work with your HR Partner to create online performance-review guide.
 - NFE - Establish written goals for the review period.
 - Faculty – handled by Provost Office/Deans

First 3 Months

- Prepare 3-month Performance Review and review with employee. (CSA only).
- Review short- and long-term goals.
- Continue to check-in with employee and answer questions.
- Discuss workload levels and any possible training needs.

First 6 Months

- Prepare CSA 5-month Performance Review and review with employee. (CSA only)
- Develop short- and long-term goals.
- Continue to check-in with employee and answer questions.

One Year

- Prepare Annual Performance Review in the Fall each year and review with employee (due by December):
 - Have employee prepare a self-evaluation of their performance and achievements from Jan – Dec.
 - Develop and confirm annual goals for the next year.