



New Employee Onboarding Checklist for Supervisors and Hiring Managers

The following checklist is to help guide supervisors and/or hiring managers and their delegates through the hiring and onboarding process to ensure that all new employees have a smooth transition into their new position.

Contents

RECRUITING PROCESS OVERVIEW	2
BEFORE THE CANDIDATE IS CHOSEN	3
BEFORE THE CANDIDATE ACCEPTS POSITION	3
BEFORE EMPLOYEE'S START DATE	4
FIRST DAY	6
FIRST WEEK	7
FIRST MONTH	8
FIRST THREE MONTHS	8
FIRST SIX MONTHS	9
SIX MONTHS TO ONE YEAR	9
30/60/90-DAY REVIEWS	10
30-DAY REVIEWS	10
60-DAY REVIEWS	11
90-DAY REVIEWS	11
MANDATORY TRAINING GUIDE (ALL EMPLOYEES)	13
MANDATORY TRAINING GUIDE (BUDGETED EMPLOYEES)	14
MANDATORY TRAINING GUIDE (JOB SPECIFIC)	15
RECOMMENDED TRAINING GUIDE	16

RECRUITING PROCESS OVERVIEW

If you are unfamiliar with the recruiting process, you can watch the PeopleSoft Recruitment Module Training Video and download the Create Job Opening Instructions [here](#).

Recruiting Process Overview

Create Job Opening

Applicants Apply for Job

Evaluate and Select Applicant

Create and Post Job Offer

Verify and Hire Applicant

For questions regarding the recruiting process, please contact Human Resources Talent and Acquisition team at Employment@spcollege.edu.

BEFORE THE CANDIDATE IS CHOSEN

☐ RECRUITING PROCESS

- Job is created, approved, and posted through PeopleSoft
- Applicants apply for position
- Review applications
- Schedule and conduct interviews
- Contact HR/TAO for recommended and/or required reference checks:
Employment@spcollege.edu

☐ Technology Access and Related

- Assess technology needs for specific position, such as computer/monitor, camera, phone, headset, speakers, walkie talkie, presentation clicker/pointer, etc.
- Return/relocate prior employee's equipment including computer, phone, headset, etc., if not already done so

☐ Facilities and Related

- Assess workspace needs such as desk, chair, equipment, storage, etc.
- Assess need for office supplies and related items
- Ensure that intended workspace is clean and clear of any prior employee's items

BEFORE THE CANDIDATE ACCEPTS POSITION

- ☐ Contact HR/TAO to confirm whether additional PARs are required for the particular position
- ☐ Send offer letter
- ☐ Once offer is accepted, return signed offer letter to TAO at
Employment@spcollege.edu
- ☐ Review [Standard Start Dates](#) and [New Employee Welcome Dates and Locations](#)

BEFORE EMPLOYEE'S START DATE

Account and Paperwork

- ☐ HR/TAO sends new hire paperwork to employee
- ☐ HR/TAO creates employee account and sends Employee ID# to hiring manager
- ☐ Once paperwork is complete and hiring manager receives the Employee ID#, TAO will direct hiring manager to complete the appropriate Onboarding Survey:
 - ❖ **Career Services/A&P:** <https://web.spcollege.edu/survey/22334>
 - ❖ **Faculty:** <https://web.spcollege.edu/survey/25211>
 - ❖ **OPS:** <https://web.spcollege.edu/survey/13887>
 - ❖ **Creating the survey prompts network account creation. PeopleSoft access request cannot be submitted until a network account has been created.**
 - ❖ IT will create new account for employee and process technology requests and any required updates
- ☐ HR/TAO sends Account Confirmation Email to hiring manager
- ☐ ***Hiring manager forwards Account Confirmation Email to new employee**
 - ❖ **This step is crucial as it directs the employee on how to set up their SPC account and know when and where to attend New Employee Welcome**
- ☐ If employee was a former student and an account already exists in MyCourses, contact onlinehelp@spcollege.edu with employee's name, student ID, and position, so they can merge the student account and employee account. The employee account becomes the dominant account
- ☐ Ensure that employee is enrolled in mandatory trainings
- ☐ If New Employee Welcome will fall on their first day, ensure that they know the date, time, and location

Technology and Facilities

- ☐ Confirm technology requests have been completed and/or receive technology equipment from IT and install, including printer and any needed programs to computer
- ☐ Receive nameplate, name pin, and/or wall sign request from onboarding survey submission, send to appropriate campus contact/office if not in your office
- ☐ Ensure that work area is clean and ready for the employee to start. If needed, order supplies and/or equipment

Socialization

- ☐ Email department/team/functional area of the new hire. Include start date, employee's role, and bio
- ☐ Exchange contact information between supervisor and new employee
- ☐ Set up meeting with critical people for the employee's first few weeks
- ☐ Arrange for breakfast or lunch with the appropriate person(s) for the first day and during first week
- ☐ Select a campus and/or department representative (buddy system)
- ☐ Meet with the campus representative to go over expectations and schedule a time for the new employee to meet with the representative
- ☐ Arrange for a campus tour on employee's first day. Coordinate visits with other campus departments, including Provost and Associate Provost offices as needed
- ☐ *If the employee is in a high level, public facing position such as Dean, Associate Dean, Provost, Associate Provost, Senior Admin, etc. email Organizational Effectiveness and Success at OES@spcollege.edu with a head shot and professional bio so that OES can send out a school-wide email introducing the employee to the Titan family



FIRST DAY

Our goals are to make the employee feel welcome, ensure that their workspace is fully equipped, and that you and their colleagues are here to support them. They should feel like they belong at SPC from day one.

Schedule, Job Duties, and Expectations

- ☐ Ensure that the employee attends New Employee Welcome (NEW), if this falls on their first day. Discuss with the employee whether they should return to their office/campus after NEW ends at 2pm to continue the workday
- ☐ Meet with the employee
 - ❖ Review job description, outline of duties, and expectation
 - ❖ Provide overview of the department's purpose, team, structures, responsibilities, and goals
 - ❖ Describe how the employee's job fits into the department, and how the job and department contribute to student success at SPC
 - ❖ Review their schedule and work hours, explain policies and procedures for overtime, use of vacation and sick time (who to contact if the employee will be out), holidays, etc.
- ☐ Prepare the employee's Outlook calendar for the first 2-4 weeks
- ☐ Direct the employee to the New Employee Guide on the HR Hub and review the New Employee Onboarding Progression Guide with them

Technology and Facilities

- ☐ Ensure that employee has necessary technology and equipment and that it is working properly
- ☐ Review computer programs, shared folders, SharePoint, Technology Help Desk, and other related technology that the employee will use for their job
- ☐ Confirm that computer is hooked up to printer and that employee has access
- ☐ Review the work order process for your campus' Facilities
- ☐ Assist employee with setting up Teams, voicemail, email, calendar, etc.
- ☐ Take employee to receive picture and badge
 - ❖ Request room keys/access if needed for position: [Access Key Badge Request](#)
 - ❖ Requests for keys must be submitted by the department head to the Provost office of that campus for approval
- ☐ Go over department of building-specific safety and emergency information
- ☐ Provide overview of the department work area, where to retrieve mail, office supplies, make copies, etc.

Socialization

- ☐ Introduce employee to co-workers, mentor (if assigned), others in the department, other close departments, etc.
- ☐ If your department works in a hybrid remote environment, schedule a Teams meeting to introduce the new employee to everyone
- ☐ Encourage employee to partake in upcoming campus events
- ☐ Take employee on a campus tour, or assign a tour guide, include a visit to the Provost and Associate Provost offices
- ☐ Send out a campus-wide email with the new employee's bio, introducing the employee to SPC

FIRST WEEK

During the first week, the new employee should start building knowledge of internal processes and performance expectations and feel settled into the work environment.

Job Duties and Expectations

- ☐ Give employee their initial assignment (make it small and something doable)
- ☐ Review and discuss the [Performance Management Process](#) for Career Service/A&P; **OR** [Faculty180](#) for Faculty
- ☐ Review and discuss probationary period (Career Service only), and 30/60/90-day reviews. Add evaluation dates to your and employee's calendar
- ☐ Debrief with employee after they attend initial meeting and begins work on initial assignment. Touch base with employee each day
- ☐ Continue to add/include employee to upcoming and regularly scheduled meetings

Training and Development

- ☐ Ensure that employee has had an opportunity to meet with their mentor (if assigned)
- ☐ If no mentor is assigned, ensure that employee has had an opportunity to job shadow and consult with people in the department
- ☐ Confirm that employee has registered for NEW (if not done on first day)
- ☐ Register employee for P-Card training if applicable to their position
- ☐ Review Mandatory and Recommended Trainings Guides (**see page.....**). Assign trainings as required or needed
- ☐ Discuss learning plan and short-term objectives
- ☐ Ensure that employee has become familiar with the HR Hub, MySPC, MyCourses, and Cornerstone
- ☐ Continue to introduce employee to people and key contacts on campus.

FIRST MONTH

During the first month the employee should become more cognizant of their performance relative to their position and expectations, continue to develop knowledge and skills, learn about the organization, and build relationships.

Job Duties and Expectations

- ☐ Schedule and conduct regular one-on-one meetings
 - ☐ Continue to provide timely, on-going, and meaningful feedback and guide employee through any challenges
 - ☐ Identify employee's strengths and assign additional duties suited to those strengths
 - ☐ Elicit feedback from employee and be available to answer questions. Ensure that mentor (if assigned) is also available to answer questions
 - ☐ At the end of the first month, or beginning of second month, meet with employee for their 30-day review. Review the Performance Management Process
 - ☐ Check employee's progress on mandatory and recommended trainings
-

FIRST THREE MONTHS

By this time the employee should be fully aware of their role and responsibilities and has begun to work independently and produce meaningful work. They should be acclimated to the environment both productively and socially.

- ☐ Schedule and conduct 60-day review. Have employee start thinking about SMART goals for the year and begin thinking about long-term goals and expectations for their position
 - ☐ Continue to give employee meaningful and increasingly challenging assignments.
 - ☐ Have employee "shadow" you at meetings to get exposure to others and learn more about the department and organization
 - ☐ Ensure that all required trainings are complete
 - ☐ At the end of the first three months or beginning of fourth month, schedule and conduct 90-day review
-

FIRST SIX MONTHS

During this period, the employee should have gained momentum, is able to produce deliverable, and has begun to lead on some initiatives. They will have built some relationships with peers and become confident and engaged in their role, while continuing to learn.

- ☐ Continue to work with employee on their SMART goals and long-term goals.
- ☐ Evaluate employee's need and/or want for additional training and guide employee to appropriate resources
- ☐ Encourage employee to become more involved with the SPC community

SIX MONTHS TO ONE YEAR

By this time, the employee should be fully engaged in their new role and able to effectively apply new skills and knowledge, make sound decisions, and contribute to department and/or team goals. They should understand how their work affects others in the organization and have developed effective working relationships. They should have a strong understanding of SPC's mission and culture and continue to be engaged in their role.

- ☐ Assign more challenging work assignments and provide employee greater autonomy
- ☐ Continue to meet regularly with employee as needed to give and receive feedback on performance and expectations
- ☐ Complete the Performance Management Process **OR** Faculty 180 Portfolio.
- ☐ Continue to support employee in their professional development process
- ☐ Ensure that any mandatory trainings that need to be done on an annual basis are complete



30/60/90-DAY REVIEWS

While this process can be rather informal or highly formal, every employee should have a 30, 60, and 90-day review to set them up for success. This method of review is to help the employee make the transition into their new role and provide them with a sense of direction. It will also allow you to set expectations and monitor progress during the first few months.

The benefits of a 30/60/90 review process are multifold. It can help optimize productivity, it can ensure that you and the employee are clear on expectations, assist with goal setting and clarification of priorities, and promote employee autonomy. Below are some guidelines on how to implement and conduct these reviews.

30-DAY REVIEWS

A 30-day review may be the first structured check-in that you have during your onboarding process. Thirty-day reviews can be completed through the use of an onboarding evaluation form or an in-person interview, though it is most beneficial to complete it in-person.

Here, you can clarify short-term priorities and expectations, gain an understanding of the employee's work ethic and competency, start to identify their strengths and weaknesses, gauge their dependability, and assess their communication style. This is also an opportunity for you to receive feedback from the employee and gain insight into the onboarding process, which can serve to increase retention.

Here are a few questions you may want to ask at this meeting:

- So far, is this job what you expected it to be?
- Are you currently feeling challenged by your role? Are you becoming bored?
- Do you feel like you've received access to all of the information, tools, and resources you need to complete your responsibilities?
- Have you felt welcomed by your new team?
- Have there been any roadblocks or challenges with performing your duties? If yes, what?
- Have you found communicating with your team to be a simple process?
- How has your team helped with your onboarding experience?
- Are there any specific tools or training sessions that you think would help you be more successful?
- How have you liked the company culture so far? What do you think could be improved?
- Moving forward, what would you like to accomplish in the next 30 days?
- Do you have any expertise or experience that you think could be better utilized?
- Are there any adjustments that you'd like to make to your role or workflow to be more successful?
- Is there anything else you'd like for me to know?

60-DAY REVIEWS

The 60-Day Review should be scheduled at the 30-Day review so that the employee is prepared to reflect on their progress. Here, the employee should feel comfortable providing honest feedback, raising concerns, and asking difficult questions if necessary.

At this time, you can start asking questions about the employee's longer-term career goals and begin to understand their internal motivations in order to more deeply examine their roles and responsibilities within the broader organization. You can also continue to find out about their experience with the onboarding process.

Below are some useful questions you can ask at the 60-Day Review:

- What are your longer-term goals in the role and organization?
- What can we do to help you achieve them?
- Has the organization/role been as we described it in your interview?
- Has the training you've received so far adequately prepared you for the role?
- Have you encountered any challenges in performing your job?
- Do you have the tools and support you need to perform your role to the best of your ability?
- Do you have any feedback on how we can improve our onboarding process?
- Do you have any feedback on how we can improve this review process?
- Can you explain how your role fits into the organization's mission and values?
- How are you finding your team?
- Is there anyone in particular in your team who has assisted you with the onboarding process?
- Are you facing any challenges within your team?

90-DAY REVIEWS

A 90-Day review is the final check-in with a new hire during the onboarding process before the more formal performance management process begins. At this check-in you should start assessing the employee's performance and continue to allow them to ask questions and provide feedback on their experience. This should include a one-page performance evaluation.

Here, you can weigh how good of a fit the employee is at SPC and whether they have successfully acclimated to the culture. You can identify areas of expertise and obstacles the employee might be facing and provide constructive criticism and potential solutions. Long-term goals should also be identified, and an outline of possible steps to achieve those goals.

See below for a list of useful questions:

- What was the most (and least) helpful part of the onboarding process?
- What future training would you be interested in?
- How has the role lived up to your expectations?
- What do you like about the position? What do you dislike?
- How would you rate your job performance thus far?
- How do you feel about your decision to work here?
- Which co-workers have been most helpful since you arrived?
- When you have questions about your work, who do you talk to? Do you feel comfortable asking?
- What difficulties have you experienced working with supervisors, co-workers or customers? How can we help?
- How do you feel your ideas are valued by your teammates?
- How clearly do you understand what's expected out of you?
- What areas do you want to improve in order to achieve your goals?
- Where would you like to see yourself in the long-term with the company?



MANDATORY TRAINING GUIDE (ALL EMPLOYEES)

ALL NEW EMPLOYEES, including Supervisors, Hiring Managers, Faculty, A&P, and Career Service Employees, OPS and Adjunct Faculty will be required to complete the following Mandatory and Compliance Trainings.

**This list is an informational list. Employees will be notified when they will be required to complete the training.*

TRAINING NAME	CONTACT	MODALITY/ LOCATION
<input type="checkbox"/> Title IX, VAWA, SaVE, Clery Overview, Sexual Harassment Prevention, Sexual Abuse & Violence Prevention	SPC-OCE@spcollege.edu ; Compliance@spcollege.edu ; EmployeeRelations@spcollege.edu	TBD
<input type="checkbox"/> INFORMATION SECURITY	InformationSecurity@spcollege.edu	Employee will be notified by email
<input type="checkbox"/> FERPA	Compliance@spcollege.edu	TBD
<input type="checkbox"/> ARMED ASSAILANT	Barto.Daniel@spcollege.edu	New Employee Welcome
<input type="checkbox"/> ETHICS & CONFLICT OF INTEREST	Compliance@spcollege.edu	New Employee Welcome

MANDATORY TRAINING GUIDE (BUDGETED EMPLOYEES)

ALL BUDGETED EMPLOYEES, including Supervisors, Hiring Managers, Faculty, Adjunct Faculty, A&P, and Career Service Employees are required to complete the following Mandatory and Compliance Trainings.

<input type="checkbox"/>	NON-DISCRIMINATION (Respect in the Workplace)	EmployeeRelations@spcollege.edu	TBD
<input type="checkbox"/>	FRAUD AWARENESS	Compliance@spcollege.edu	TBD
<input type="checkbox"/>	SPC EMERGENCY PLAN & ICS OVERVIEW	Grey.Bill@spcollege.edu	MyCourses
<input type="checkbox"/>	ACCESSIBILITY SERVICES	www.spcollege.edu/accessibility	MyCourses
<input type="checkbox"/>	PUBLIC RECORDS	Compliance@spcollege.edu	TBD

MANDATORY TRAINING GUIDE (JOB SPECIFIC)

Depending on the specific position, some employees are required to complete the following Mandatory and Compliance Trainings. Check with your supervisor to see which ones apply to your position.

HIPAA PRIVACY & SECURITY	All HR & Any Employees with Access to PHI	Benefits@spcollege.edu
SUPERVISOR & MANAGER COMPETENCY	Supervisors	OES@spcollege.edu
VEHICLE/DRIVING	Any Employee Driving a College Vehicle	Barto.Daniel@spcollege.edu
OSHA (LIFTING & BENDING)	Any Employee Using Power Equipment	Barto.Daniel@spcollege.edu
CLERY ACT	Employees Dealing with Student Discipline	Barto.Daniel@spcollege.edu
HIRING PROCESS	Hiring Managers	Employment@spcollege.edu
CPR/AED	Safety & Security Employees, and if Within Job Description	Barto.Daniel@spcollege.edu
ICS & RESPONSE	Safety & Security Employees, and if Within Job Description	Barto.Daniel@spcollege.edu
ADA	Supervisors	EmployeeRelations@spcollege.edu
FLSA	Supervisors	EmployeeRelations@spcollege.edu
CETL MENTAL HEALTH AWARENESS	Faculty	https://facultysupport.spcollege.edu/

RECOMMENDED TRAINING GUIDE

TECHNOLOGY SKILLS	SOURCE/LOCATION
INTRO TO MYCOURSES	MyCourses
MICROSOFT TEAMS	Microsoft Teams Video Training
OFFICE 365	Microsoft 365 Basics Video Training
SHAREPOINT 101	Microsoft SharePoint Video Training SPC SharePoint Training
ADOBE	Acrobat Tutorials

JOB SKILLS	SOURCE/LOCATION
OES OFFERED COURSES	Register on Cornerstone
PCARD TRAINING	TBD
TAR (TRAVEL AUTHORIZATION REQUEST)	How to Complete a TAR Video; Where and Why of TAR Video
PEOPLESOFT	Cornerstone
NAVIGATING THE TITAN HUB	SPC Resources
SPC SURVEY BUILDER	Video Tutorials
BLOGS	Blog Resources
BLUE & WHITE	Blue & White Posting
PEOPLESOFT RECRUITMENT MODULE (For Hiring Managers)	Cornerstone Content