

Hiring Leader's Onboarding Checklist

This checklist is designed to assist the hiring leader with the onboarding process. It is organized chronologically and assists in the preparation. You may wish to add additional activities and/or delegate the task to another member of the team (for example, arranging the lunch).

Pre-Arrival for Faculty and Staff:

	Contact I-9 Partner to set up a time for the new employee to complete the I-9.
	Submit an IT service request IT Onboarding Request for physical technology that the new employee will need (laptop/desktop, monitor, mouse, keyboard, etc.) as well as to assign/transfer a telephone number, initiate request for a PSU ID card, and initiate keyless entry access.
	The manager should contact the campus Access and Security Representative (ASR) to obtain access to necessary systems. Note: Determination of system access is based on the employee's job responsibilities and will be finalized by the ASR and the manager.
	Work with department supervisor to assign a copy code, if applicable. Inform the mailroom of the new employee's name and location.
	Once the employee signs the letter of offer/contract, call/email to officially welcome them to Penn State York and to answer any immediate questions. Confirm their first day arrival time and meeting location. Provide a contact number in the event of a question or issue. Ask the employee if any workplace accommodations are needed. Contact your HR Consultant for advice and assistance.
	Prepare a schedule for the first 1-2 weeks using Outlook and assemble a department orientation packet to include contact names of departments and where to find frequently used information/forms. Schedule face-to-face meetings with departments the employee will work with regularly.
	Arrange a lunch for the new employee on their first day.
	If applicable, request LionPath access at: https://lionpathsupport.psu.edu/faqs/facultystaff-faqs/security/
	Send an email announcement to the appropriate York campus listserv announcing the new employee and his/her start date.
	Collect information to give the new employee upon arrival (items such as job description, organizational charts, strategic plans and priorities, phone listing, and specific policies and procedures that pertain to their role).
	Ensure workspace is clean and has all necessary equipment and supplies. Order a nameplate and business cards (if required order the business cards at Penn State Multimedia & Print Center so they are ready prior to the employee's arrival). Verify any accreditations with employee prior to printing business cards.
	Contact the Business office to request office key/s for the new employee.

Pre-Arrival for Faculty Only (in addition to list above):

	Collect resume or CV with dates.
First Day Orientation - Faculty and Staff:	
	Plan the employee's first assignment/project so he/she has early success.
	Introduce the new employee to co-workers and have them set up one-on-one conversations with team members throughout the first few weeks.
	Provide time for new employee to meet with I-9 Partner to review and complete I-9.
	Discuss procedures for scheduling time off, unexpected absences, and what to do if they will be late. Explain working hours/schedule, breaks, overtime, pay schedule, flexible work options, if applicable Penn State Human Resources . Note: Review part-time employee policies, if applicable.
	Clarify vacation, sick time and statutory holiday policies at: Holidays PSU Human Resources . Note: Review part-time employee policies, if applicable.
	Give a department tour including location of bathrooms, breakrooms, and use of appliances, copy/fax machine, and emergency exit.
	Provide parking registration information Faculty and Staff Parking Registration . Walk new employee to University Police & Public Safety for introductions.
	Contact Academic Affairs to add employee to appropriate listservs.
	Add new employee to campus web directory by contacting the Director of Strategic Communications. Have photo taken for campus directory (optional). Add to campus email/phone directory by contacting Academic Affairs.
	Walk employee through enrolling in 2FA .
	Ensure that the new employee received confirmation of their Access Account.
	Walk to Grumbacher ISTC Building to get photo ID (issuance of photo ID is tied to employee's first pay).
	If applicable, direct employee to take FERPA training at FERPA tutorial .
	Direct employee to sign up for PSU Alerts at PSUAlert .
	Direct employee to take Clery Act training .
	Provide an overview of Outlook - email, calendar, calendar sharing.
	Provide phone training and instruct the new employee to reset voicemail settings.
	Review emergency procedures ensuring you identify any procedures unique to the employee's work location(s). Set up departmental emergency procedure review with University Police & Public Safety to take place during employee's first month of employment.
	Give the new employee information and instructions about obtaining and using equipment and supplies (fax, photocopier, etc.). Provide copy code, if applicable.

	Review onboarding objectives and timelines and provide an overview of the position responsibilities.
	Arrange for weekly meetings with the new employee to review and support their transitions. Hold some meetings in an informal atmosphere to make the new employee feel more comfortable.

First Week Orientation - New Faculty and Staff

	Review in detail responsibilities, competencies, and expectations, and explain how the role fits in the work group and department.
	Explain your own responsibilities, current priorities, and how the employee's job supports them. Also, explain other important persons within the department as well as their responsibilities.
	Review the department's mission, vision, current goals and priorities, and provide a copy of the current organization chart. Review the functions of other departments where relevant. Arrange for tours of those departments and/or the campus.
	Ensure that the employee has reviewed the Penn State York Chancellor's Welcome , Quick Facts , Vision, Mission, and Diversity Statement , and Strategic Plan .
	Review the department and the Penn State York website with the employee to answer any questions he or she has about using it.
	Review HR benefits website . Offer New Employee benefits related orientation . Note: Direct them to seek out part-time employee policies, if applicable. Arrange for a meeting with the campus's HR Consultant.
	Ensure that the new employee and I-9 partner have met to complete the I-9 within the first three days of work.
	Schedule Penn State York photo with the Director of Strategic Communications; direct employee to complete and submit his/her bio as applicable.
	Review relevant University policies impacting their work.
	Discuss how you and the employee will communicate; preferences of each, patterns and frequency, and how the employee can give feedback to improve things. Review relevant decision-making processes.
	Share unwritten rules, nuances, and traditions with the employee. This includes which supplies are available from the campus mail/copy room and which supplies need to be purchased via external vendors and Penn State Purchasing guidelines
	Review Penn State Policies . Note: Review part-time employee policies , if applicable.
	Review Employee Reimbursement System site and how/when to use it.
	Ensure employee completes mandatory eLearning and advise them to print off and provide their certificate of completion to you for the Annual Compliance Training, Clery Act Training, Building a Safe Penn State: Reporting Child Abuse, and Title IX.
	Schedule meetings with key employees outside the department, as required.

	<p>Review Employee Perks:</p> <ul style="list-style-type: none"> • Fitness Center • Health & Wellness Initiatives • Tuition Discount • Car Rental Discount • Computer Purchase Discount • Shopping Discounts • Employee Assistance Program (EAP) and Health Advocate
	<p>Train new employee on Office 365, G Suite for Education by Google.</p>
	<p>Add employee to recurring meetings or set up new meetings.</p>
	<p>Review Copy Services, if needed.</p>
	<p>Review WorkLion website and timekeeping, if applicable.</p>
	<p>Refer employee to Learning Resource Network for training, if needed.</p>
	<p>Review Penn State York C&IS website: where to submit a service request; help desk information.</p>
	<p>Review the onboarding process with the employee.</p>
<p>First Week Orientation - <u>Faculty Only</u> (in addition to list above):</p>	
	<p>Review Faculty Senate information.</p>
	<p>Review school-specific topics and procedures. Request Library Instructional Support for you and your courses.</p>
	<p>Review relevant academic polices.</p>
	<p>Contact the Instructional Designer to register faculty for Canvas training, review syllabus requirements, first day of class best-practices, etc.</p>
	<p>Review faculty resources at the bookstore and textbook ordering procedures. Request semester course reserves and ereserves at the Library for short-term student use.</p>
	<p>Set up GRADS access (Graduate Admissions Decision System) with faculty.</p>
	<p>Review advising expectations and train faculty on how/when to use LionPath and Starfish.</p>

Review relevant faculty resources: <ul style="list-style-type: none"> • LinkedIn Learning • Turnitin • SRTE (Student Ratings of Teacher Effectiveness) • Weblearning at PSU • Nittany Ai Alliance
Review curriculum review and consultation system.
Review Activity Insight .

First Month Orientation - Faculty and Staff:

Schedule regular meetings to touch base, review and clarify performance objectives and expectations, project/teaching updates, and answer any questions.
Provide positive coaching to build esteem and confidence.
Review issues or challenges and identify how to resolve.
Continue to provide regular informal feedback.
Remind and ensure that OHR training has been completed to update records.
<p>Discuss other training that has been completed. Also discuss future workshops and training that may be beneficial to their development. This information can be found by visiting the University's human resources page dedicated to professional development Talent Management and clicking on the Talent Management heading.</p> <p>Check calendar of events on https://york.psu.edu/faculty-staff/staff-advisory-council (Penn State York Staff Advisory Council) webpage for SAC sponsored professional development opportunities.</p>
Provide information about University events and activities related to the employee's interests. Review online calendars and share how to get communications out. Review items such as proper usage of campus listservs, advertising on the stall seat journal and TV screens on campus. Review upcoming schedule of faculty senate and Staff Advisory Council (SAC) meetings and inform employee they can attend these meetings if they wish. Review Student Government Association (SGA) meetings. If employee would like additional information about SGA, they should contact the associate director of Student Affairs at 717-771-4049.
If the new employee's position includes financial management, please contact the Finance Office at 717-771-4123 for information on various types of financial training sessions available.
Check in with the employee to review the onboarding process — is it working well, can they provide any feedback to improve the process?
Support and ensure attendance at the New Employee Orientation Panel (invitation sent by SAC).
Review catering request process, if applicable.

	Review 25Live process for room reservations and entering events on the campus calendar, if applicable. See campus instructions for this process here: https://www.york.psu.edu/event-request
	Review SIMBA procedures and tax-exempt status.
	Review CCURE access by contacting the Department of Police and Public Safety, 717-771-4103. This pertains to the employee's ability to access the various campus buildings with their PSU ID card.
	Review procedures for submitting maintenance and janitorial requests through School Dude, Welcome to MySchoolBuilding if applicable. Before submitting a request, employees must be registered as a new user by contacting the Director of Facilities, 717-771-4191.
	Arrange for a P-card and direct employee to take P-Card test, if applicable.
	Review University standards for publications and marketing/promotion including University style manual Visual & Editorial Standards , University branding The Brand Book , and official campus marks Penn State York Marketing Resources . For specific questions contact the Coordinator of Publications & Promotion.
	Review service opportunities by providing an overview on Student Clubs, SAC, DEEC, and Commission for Women.