

New Employee: \_\_\_\_\_ Date of Hire: \_\_\_\_\_

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

| <b>Contact your new employee prior to first day of employee.</b>                       | Complete |
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| Call to welcome your employee 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 your new employee of any pre-scheduled lunch plans. |          |
| Confirm parking location and need to bring in vehicle registration.                    |          |
| Answer any questions the new employee might have at this time.                         |          |

| <b>What to do prior to your new employee's arrival in the office:</b>                                                         |  |
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| Prepare new hire PNF immediately after acceptance - include office location and office phone number.                          |  |
| Order laptop (if needed), keys, name plate, etc.                                                                              |  |
| Order business cards (if appropriate) and miscellaneous office supplies, as needed.                                           |  |
| Communicate new employee's start date with department and share expectations for their involvement in the onboarding process. |  |
| Arrange for yourself or someone in your department to accompany the new employee to lunch on their first day.                 |  |
| Prepare an agenda for the first day and the first and second week.                                                            |  |
| Schedule training for Loyola and appropriate third-party systems used in your department.                                     |  |
| Prepare a list of the members within your department and their general responsibilities.                                      |  |
| Consider assigning a team "buddy" as an immediate resource for any questions.                                                 |  |

| <b>Getting Ready for Day 1 and Day 2</b>                                                                                                                    |  |
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| Review organizational structure of department and division                                                                                                  |  |
| Discuss department and university goals and strategy, provide information on key initiatives your department leads or takes part in the process.            |  |
| Review position description, discuss performance evaluation, and begin to share expectations.                                                               |  |
| Review process for requesting time off and submitting time.                                                                                                 |  |
| If supervising, review process for approving time for direct reports.                                                                                       |  |
| Schedule one-on-one meetings with the other team members. Provide a short description of their colleagues work and how it will integrate in the department. |  |
| Schedule weekly meeting with the new employee to check in on progress; keep as a priority until you determine if a different meeting cadence is needed.     |  |
| Allow employee time to obtain parking pass.                                                                                                                 |  |
| If applicable, discuss flexible schedule options, as needed (may be postponed during initial training period).                                              |  |

| <b>The First Week Experience:</b>                                                                                                      |  |
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| Ensure that some work assignments are ready for the new employee and that a person or training resources are available and introduced. |  |
| Review purchasing and travel information and arrange for training, if needed.                                                          |  |
| Allow ample time to review department and university policies during work hours, as needed.                                            |  |
| Encourage employee to become acquainted with the Loyola website and pertinent departmental information on the shared drive.            |  |
| Review campus room reservation system, if needed.                                                                                      |  |
| Ensure that they have completed their benefits enrollment and will attend new employee orientation.                                    |  |

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| <b>Continued onboarding through the first 3 months of employment:</b>                                                                                   |  |
| Continue to clarify employee's roles and responsibilities, and your expectations with them.                                                             |  |
| 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 and discussions afterward for the employee during this time. They will have a better onboarding experience. |  |
| Discuss your employee's initial experiences and whether they are matching his or her expectations.                                                      |  |
| Identify any concerns the employee may have, and offer what help and advice you can provide.                                                            |  |
| Solicit feedback from the new employee regarding how you can help improve the integration experience with them.                                         |  |
| Ensure completion of required training online, including Title IX and FERPA training.                                                                   |  |
| Support participation in campus-wide functions.                                                                                                         |  |
| Set up calendar for three-month review for a non-exempt employee or six-month for an exempt employee                                                    |  |
| Continue to support/require participation in monthly New Employee Orientation meetings for the first six months.                                        |  |
|                                                                                                                                                         |  |
| What is SMART? For goals and project management.                                                                                                        |  |
| S - Specific - What will be accomplished? What actions will you take?                                                                                   |  |
| M - Measurable - What data will measure the goal? (How much? How well?)                                                                                 |  |
| A - Achievable - Is the goal doable? Do you have the necessary skills and resources?                                                                    |  |
| R - Relevant - How does the goal align with broader goals? Why is the result important?                                                                 |  |
| T - Time Bound - What is the time frame for accomplishing the goal?                                                                                     |  |

#### Job Specific Goals

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