

New Employee Onboarding Checklist

Directions: This checklist is designed to assist with the department’s orientation process. Onboarding is a long-term process that begins before an employee’s start date and continues for at least six months. This Checklist is organized chronologically and helps hiring managers prepare for the arrival of new employees. Once an employee starts, he/she can work together with the hiring manager and an onboarding peer* to complete the checklist. The hiring manager may add additional activities that are relevant to the new employee’s area. Internal transfer employees may omit items that are not applicable.

*An onboarding peer is a peer to the new employee who can assist in the onboarding process and be a “go-to” person as directed by the manager.

Pre-Arrival

Task	Who Initiates:
<input type="checkbox"/> Confirm offer letter sent to new employee	Human Resources or Hiring Manager
<input type="checkbox"/> Call or email to officially welcome the new employee to the Law School after confirmation of acceptance	Hiring Manager
<input type="checkbox"/> Provide new employee with a contact in the event of a question or issue	Hiring Manager
<input type="checkbox"/> Create an onboarding schedule for new employee http://www.northwestern.edu/hr/training/hrmtoolkit/	Hiring Manager
<input type="checkbox"/> Assign onboarding peer* for new employee’s first two months on the job	
<input type="checkbox"/> Schedule new employee to attend New Employee Orientation, Part 1 within the first two weeks of start date. No advance registration required. For time and location, go to www.northwestern.edu/hr/training/newemployee.html	
<input type="checkbox"/> Contact Marketing and Communication office to order business cards, if applicable	Hiring Manager
<input type="checkbox"/> Contact Administrative Services to order name plate	Hiring Manager

To obtain a NetID for the new employee up to 90 days before the date of hire:

(New employees must be hired in HRIS to get a NetID in order to sign-in to HRIS Self Service for Benefits Enrollment. For additional NetID automation information, visit <http://www.northwestern.edu/hr/hris/netid/index.html>)

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| <input type="checkbox"/> The new employee completes the Personal Data Form and fax back immediately to the respective HR fax number for each campus as indicated on the offer letter. Download the form at http://www.northwestern.edu/hr/payroll/PersonalDataForm.pdf | |
| <input type="checkbox"/> Contact Administrative Services and Information Technology to set up computer, phone, log in password, and order office supplies | Hiring Manager |
| <input type="checkbox"/> When the NetID is created, Administrative Services will notify Hiring Manager by e-mail. | |
| <input type="checkbox"/> Hiring Manager or Onboarding Peer provides the NetID, email account and | |

password information to the new employee who then activates the NetID at www.northwestern.edu/facstafflogin

- Send an announcement via email to the applicable Law School community announcing the new hire and start date (sample email template on Law School Staff web page)

Additional activities to complete if applicable

- Send Nonresident Alien information web links to new employee and request he/she to fill out the forms (if applicable). Go to <http://www.northwestern.edu/international> and click on Faculty and Staff
- Nonresident Alien – Contact the International Office at 847-491-5613. For more information, go to www.northwestern.edu/international
Contact Payroll at 847-491-7362 (Evanston) or 312-503-9700 (Chicago) to register to use the Foreign National Information System. For more information, visit www.northwestern.edu/hr/payroll/nonresidentinfo.html

Arrival

1st Day

- | | Who Initiates |
|---|----------------------|
| <input type="checkbox"/> Go to HR office (Evanston – 720 University Place; Chicago – Abbott Hall) to complete W-4, I-9, and Personal Data Form, sign Employment Application, and receive Staff Handbook and benefits packet | Employee |
| <input type="checkbox"/> Remind new employee to complete the online benefits enrollment via eBenefits within the first 31 days of employment (Must have NetID and password) | Hiring Manager |
| <input type="checkbox"/> Contact Administrative Services regarding parking options | Employee |

Department Onboarding

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| <input type="checkbox"/> Introduce to co-workers | Hiring Manager |
| <input type="checkbox"/> Distribute assigned key and/or access card to office | Hiring Manager |
| <input type="checkbox"/> Discuss procedures for scheduling time off and unexpected absences | Hiring Manager |
| <input type="checkbox"/> Review work schedule, pay schedule and overtime policy (if applicable) | Hiring Manager |
| <input type="checkbox"/> Review appropriate attire for workplace or lab | Hiring Manager |
| <input type="checkbox"/> Go over phones, fax, copier, office supplies | Peer |
| <input type="checkbox"/> Provide NU Computer Orientation at desk (Computer sign-in, Shared drives on Network, Email, Meeting Maker, School/Department's Website) | Peer |
| <input type="checkbox"/> Give a department tour (place to hang coat, washroom, water fountain, vending machine, pantry/kitchen, refrigerator, emergency exit, parking space) | Peer |
| <input type="checkbox"/> Arrange a welcome lunch for new employee | Hiring Manager
and / or Peer |

Within 1st Week

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| <input type="checkbox"/> Activate NetID online if you have not done so at www.northwestern.edu/facstafflogin | Employee |
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- Bring photo identification and NetID to obtain WildCARD from the WildCARD office in Norris for Evanston (Underground Level) and Abbott Hall, Room 100 for Chicago (Please verify NetID is in the system before going: EV 847-467-6843, CH 312-503-0548) Employee
- Obtain permanent parking permit from the Parking Office @ 1819 Hinman Avenue, Evanston or @ Abbott Hall, Room 100, Chicago (prior department approval required for Chicago parking) - must have NetID Employee
- Sign up for direct deposit and update online directory in HRIS-Self Service Website (must have NetID and password) at <https://nuhr.northwestern.edu/> Employee
- Sign up for CTA or RTA benefits programs (for CTA train and shuttle, and Metra commuters), if desired, at www.northwestern.edu/hr/payroll/transit.pdf Employee

Communicate Job Expectations and Review Departmental Procedures

- Review job responsibilities, competencies, and expectations Hiring Manager
- Review performance feedback and appraisal process using Performance Excellence process, visit www.northwestern.edu/hr/training/perfex.html Hiring Manager
- Review department's mission, strategy, values, functions, policies and procedures; organization of the department; critical members of the department; departmental staff directory, department calendar, confidentiality of information; emergency regulations, health and safety training Hiring Manager
- Review University Standards for Business Conduct (nondiscrimination, no smoking, drug and alcohol, no tolerance of workplace violence, sexual harassment prevention and resolution) Hiring Manager
- Review Department Safety Plan Hiring Manager

Training (as applicable)

- CAFÉ training. Sign up at www.northwestern.edu/finsys/training/training.html Employee
- HRIS training. Go to HRIS Self Service at <https://nuhr.northwestern.edu> (Under the Learning and Development folder, click Request Training Enrollment and then click Search by Course Name. Type in HRIS and hit search; all scheduled courses for HRIS will be listed.) Employee
- eRecruit training. Sign up at www.northwestern.edu/hr/hris/erecruit/index.htm Employee
- Electronic Time Entry System (ETES) computer-based training (CBT) (for biweekly staff and temporary employees only). Go to www.northwestern.edu/hr/payroll/etescbt/index.html Employee
- Other workshops and trainings: www.northwestern.edu/hr/training Employee

Within 2 Weeks

- Attend New Employee Orientation, Part 1: Benefits, work schedule and payroll, University resources, ethics and compliance, IT security, campus safety and parking Employee
- Schedule new employee to attend New Employee Orientation, Part 2 two to three months into employment (Advance registration required. Please visit www.northwestern.edu/hr/training/newemployee.html) Hiring Manager
- Schedule weekly or monthly meeting to touch base with supervisor Employee
- Overview of budget and finance procedures and policies (if applicable) Hiring Manager

- Facilitate enrollment in the University Business Processes Workshop(s) related to job: Hiring Manager
Introduction to University Business Processes, Acquiring Goods and Services,
Accounting and Reporting Processes, Effective Business Operations (as applicable).
Sign up online at www.northwestern.edu/hr/training/business.html

Within 1st Month

- Enroll for benefits via electronic eBenefits system within 31 days of hire date Employee
- Review and clarify performance objectives and expectations after the first month Hiring Manager
- Set up brief meeting with department's head (Director or Vice President) Hiring Manager
- Register for New Employee Orientation, Part 2 Employee

During First 90 Days

- Attend New Employee Orientation, Part 2: Hear from a Northwestern senior leader Employee
about the University's current state and future direction, attend Standards for
Business Conduct and Performance Excellence workshops for managers and staff,
meet fellow new employees.
- Review and discuss the staff member's performance objectives Hiring Manager

5th and 6th Month

- Review performance objectives and progress Hiring Manager
- Discuss training completed and training planned for the future Hiring Manager

Annual Performance Review

- Conduct annual performance review Hiring Manager
- Set objectives for the coming year with employee Hiring Manager

Once complete, this checklist should be signed by both the staff member and the supervising staff or faculty member. A copy should be provided to the staff member with the original filed in the department staff member's file. Please contact your human resources consultant with any questions.

Staff Member's Name (Please Print) _____

Job Title _____ Hire Date _____

Staff Member's Signature _____ Date _____

Supervising Staff or Faculty Member Signature _____