Manager New Employee Pre-Boarding & Onboarding Checklist

Please refer to this checklist to ensure that you have covered all necessary pre-boarding and onboarding steps for your new employee. This checklist includes all steps from pre-hire through your employee's first year at UMass Dartmouth to ensure a successful transition and informative experience for your employee.

Pre-Boarding Steps

Before Your New Employee Starts Work: Obtain Equipment & All Necessary Access ✔

ATTENTION! In order to request the following equipment and services for your new employee, you will need their Employee ID# which will be provided to you by Human Resources via email, prior to their start date.

Computer Equipment: Contact CITS at ITHelp@umassd.edu to arrange for all necessary computer equipment (ie. new computer* or reconfiguration of existing computer). You will receive an automated ticket receipt confirmation for your request and CITS will contact you directly. ☐

*If a new computer is purchased, please note that a **2-3 week lead time** may be necessary.*

Shared Drives: Confirm your new employee has access to all applicable Departmental Shared drive(s) by contacting CITS at ITHelp@umassd.edu to submit your request.

Telecom Services: Contact Telecom@umassd.edu for telephone equipment needs, extension assignments, & voice mail preparation ☐

Click here for more information on telephone/voice mail requests.

Key Requests: Submit any applicable key requests here. If you do not see the Building and Room you need a key for, please notify key control at Key.Control@umassd.edu. ☐

PeopleSoft/COIN ACCESS - The manager must submit a COIN ACCESS REQUEST FORM using the IT Help Ticket indicating advisor access is needed. ☐

Pre-boarding Steps (Continued)

Before Your New Employee Starts Work: Workstation & Schedule ✔

Prepare Workstation: Ensure work area is set up appropriately with necessary supplies including writing pads, writing utensils and pen cup holder, stapler, penda flex folders and other file supplies ☐

Meetings: Schedule meetings with key people. Once your new employee's email account has been activated, you will add the meetings to your new employee's calendar. ☐

Important Contact Info:

For urgent **onboarding** questions or issues:
- **Sandra Escaleira** (508) 999-8045

For urgent **benefits** questions or issues:
- **Kristen Gaudette (**508)-910-6051

For urgent **Payroll** questions or issues:
- **Michelle O'leary (**508)-999-8049

For any other **Human Resources** questions or issues – Submit a Case: HR Questions

For **UMass Pass and/or Parking** questions:

- **UMass Pass Office**: 508-999-8134
- umasspass@umassd.edu
- **UMass Parking Office**: 508-999-8121
- parking@umassd.edu

For **Computer Information & Technology Services (CITS) and COIN** questions**:**

- Submit an **IT Help Ticket** IT HELP

Announcement: Notify your department team of your new employee and their start date	☐
Welcome Packet: Assemble a Welcome Packet for your new employee	☐
Your Welcome Packet should include: ✓ *Schedule for their first week of employment* ✓ *Department/Division Organizational Chart* ✓ *Department Contact List including team member titles, phone extensions, and email addresses*	

Onboarding Steps: First Day of Work through the First Year

On Your New Employee's First Day of Work	✅
Bring your new employee to their work station	☐
Begin and end the day with a face-to-face meeting	☐
Introduce your new employee to the departmental staff	☐
Provide your new employee with their Welcome Packet and review together	☐
Review their job description and discuss expectations	☐
Provide your new employee with an office tour which includes break/lunch areas, restrooms, copy machines/printers, office supply area(s), elevator(s), stairs, etc. Include a tour of the building and campus.	☐
Assist your new employee with setting up their voice mail, including an overview of out of office messaging guidelines	☐
Confirm that your employee has obtained their UMass Pass. Ensure they have successfully registered their vehicle(s) on the UMass Parking Portal online.	☐

Onboarding Steps: First Day of Work through the First Year (Continued)

On Your New Employee's First Day of Work (Continued)	✅
Confirm your new employee has access to Departmental Shared drive(s)	☐
Confirm your new employee has set up their UMassD email account	☐

Employee Trainings

To register for an employee training, navigate Here.

Available courses may include the following and are dependent upon your position. Please check with your supervisor before registering:

- Financial Training Classes
- Peoplesoft Travel & Expense w/ Terra Dotta Travel Registry
- Buyways Requisitioner/Shopper Training
- Approval Training for Buyways Requisitions & PeopleSoft Travel & Expenses
- PeopleSoft Financial Reports & Budget Lookup Session
- Summit 101 Financial Dashboard Informational Session

Do a technology check-in: Verify working computer, departmental access/portal, printer hook-up, software needs, email, phone/voicemail, etc.	☐
Review UMass Dartmouth and Departmental-specific information (ie. Time and attendance, emergency procedures, security protocols and building hours, panic alarms, etc.)	☐
During Your New Employee's First Week	✅
If your new employee will be a timekeeper for your department, or if they will be approving other employees' time, ensure that they have completed **Time Approver Access Request** via the HR Portal here	☐
Schedule weekly or bi-weekly meetings to help foster the engagement of the new employee with the organization	☐
Provide your employee with a list of pre-scheduled training dates/meetings and discuss development plans to support your employee in their new role. Work with your employee to register for job-related trainings. Employee trainings can be found here.	☐
Order business cards, name tag, and name plate (if appropriate)	☐
Provide access to University and department guidelines.	☐
During Your New Employee's First Month	✅
Discuss process for Performance Management, review performance standards, share the appropriate performance evaluation forms and timelines.	☐
Set up time with your new employee to develop goals for the first year.	☐
During Your New Employee's First Year	✅
Continue to meet with your new employee regularly throughout the year to establish new goals, build a strong relationship, and provide continuous feedback	☐