

New Employee Onboarding Checklist

“I am welcomed; therefore, I belong!”

Directions: This checklist is designed to assist with the new employee’s onboarding process. Onboarding is a long-term process that begins before an employee’s start date and continues into the employee’s first year of employment. It helps the new hire feel welcome and prepared in their new position. This checklist is organized chronologically and assists with the preparation of the arrival of the new employee. The department may add additional activities that are relevant to the new employee’s position.

Employee’s Name (please print) _____

Job Title: _____ **Hire Date** _____

		Quick List	Details
Pre-Arrival – Without Employee ID# (EMPLID)			
		Call to Welcome New Hire	Call to officially welcome the new employee to NDSU after confirmation of acceptance. <ul style="list-style-type: none"> • Provide information to a contact person in the event the new employee has a question or issue (onboarding peer is recommended) • Let the new employee know where to park and report to on the first day, dress code, work day hours
		Send Announcement to Department	Send an announcement (i.e. email) to the department announcing the new hire and the start date.
		Benefits Session	All newly hired employees receive an email invitation to attend the next available new employee benefits meeting.
		I-9 Completion	Ensure completion of the I-9 form <i>On-campus or Fargo area employees:</i> <ul style="list-style-type: none"> • Section 1 - To be completed by employee no later than the 1st day of employment • Section 2 – Document verification must be completed no later than the 3rd day of employment by HR/Payroll Staff <i>Off-campus and out of Fargo-area employees:</i> <ul style="list-style-type: none"> • Section 1 - To be completed by employee no later than the 1st day of employment • Section 2 – Document verification must be completed no later than the 3rd day of employment by Authorized Personnel or Notary Public
		Request Phone Service	Contact your department’s Phone Counselor
		Computer Ordering & Set-up Information (for new or existing machines)	<ul style="list-style-type: none"> • Check preferred computer hardware configurations at: https://kb.ndsu.edu/page.php?id=100623 • Purchase selected computer from the Bookstore: www.ndsubookstore.com (Electronics) or call 231-7761 for assistance • Contact your department’s Software Contact to have PC imaged or re-imaged. https://kb.ndsu.edu/97435
		Order Name or Door Plate	Departmental decision
		NDSU Name Badges	For guidelines, questions, or if you need information regarding appropriate format, or recommended vendor: <ul style="list-style-type: none"> • Contact: Amy Ochoa VP University Relations, www.ndsu.edu/vpur 701.231.1068 mailto:amy.ochoa@ndsu.edu
		Work Space	Organize work space and order supplies
		Update Website Info	Department responsibility

Supervisor	Office Admin	N/A	Quick List	Details
			Authorize Parking	Notify the parking office a new employee is authorized to park in a designated lot. Please include name and lot designation. Please notify parking office 24 hours prior to employee start date. Email: ndsuhelpdesk@ndsuhelpdesk.edu Permits can be purchased on the NDSU Parking website, to which a temporary permit can be printed at the end of the transaction. https://www.ndsu.edu/parking/permitsales_emp/
			Prepare List of Contacts	Prepare a list of contact information (names of staff, job titles, job duties, contact information) and other contacts across campus. NDSU Contact List: Alphabetical Office Directory (ndsuhelpdesk.edu)
			Prepare Welcome Packet	Have information available to go through and discuss with the new employee on their first day (Meeting with New Employee). Some suggestions: <ul style="list-style-type: none"> • Campus Map • University and Department Organizational Charts • Campus Contact Lists • Leave Slip/Time Sheet (if applicable) • Floor plans of Memorial Union (Conference Rooms) • Holidays and Break Times (if applicable) • Injury Report
			Schedule New Employee (Staff)/ Faculty Orientation Session	For Staff: This is the half-day quarterly orientation with Human Resources and our NDSU President. HR will send invites to new staff when the quarterly sessions are scheduled. For Faculty: This is a two-day yearly orientation in the fall with the Provost/Equity office. <ul style="list-style-type: none"> • Contact Equal Opportunity & Title IX Compliance office: 701-231-6671
			Misc.: Reimburse Moving Expenses	Check with your Vice President to see if applicable Please refer to Policy 171 at www.ndsu.edu/policy
Pre-Arrival – after you receive the Employee ID# (EMPLID)				
Access and Authorizations: (IT Services, Building Access, Miscellaneous)				
			Automated IT Services (enroll)	Once you have the <i>employee's electronic ID #</i> , provide it to the employee. If they have a computer at home, direct them to https://kb.ndsu.edu/page.php?id=95180 for instructions on activating IT services. Within 24-48 hours of “enrolling” the employee will automatically receive access to: <ul style="list-style-type: none"> • E-mail address • Wireless access • Desktop Auth (cluster and computer lab login) • Library services • Gartner Research Group https://www.ndsu.edu/news/view/detail/2458 If this doesn't work, contact the Help Desk ndsuhelpdesk@ndsuhelpdesk.edu or 231-8685.
			Departmental IT Services	Services that are specific to the department need to be requested from the Help Desk by the employee's supervisor. Send request to ndsuhelpdesk@ndsuhelpdesk.edu Such service requests include, but are not limited to: <ul style="list-style-type: none"> • Department shared drives (S: drive) • Content Management System (Typo3 – website creation/editing) • Perceptive Content
			Request Building Access – Keys or Card Access	Contact your department's Key Control Person
			Authorize FAMIS Discoverer Reports Access/Information	If applicable, authorize access to the FAMIS Discoverer Reports (billing reports) http://www.ndsu.edu/fileadmin/vpfa/forms/FM-NDUS_FMS_SelfServiceRequest.pdf link to the appropriate PDF form

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			Order Business Cards	Order online at: http://www.ndsu.edu/printandcopy/job_submission (must have employee ID and email address prior to ordering business cards)
Miscellaneous Services: (add departmental specific items)				
			Dept LISTSERV	Make sure employee is added to the appropriate department LISTSERV(S).
First Day				
			Greet New Employee	Show the new employee their workspace
			Introductions	Introduce the new employee to co-workers, other employees in the building and others (suggestion: have a welcome coffee break or lunch with all employees)
			Department Tour	Provide a tour of the department including critical areas such as time clock, mailboxes, break area, restrooms, office supplies, copiers, fax machines, printers, etc.
			Campus Tour	Provide a tour and map of the campus. Some suggestions to include in the tour: <ul style="list-style-type: none"> • Dining services • Departments the new employee will work with closely • Wellness Center • Memorial Union (Conference Rooms) • Library • Facilities Management (parking, motor pool) NDSU Virtual Tour: https://tours.bemorecolorful.com/v/GOAzA7bvqQp
			Obtain Parking Permit	Assist employee with obtaining their parking permit: http://www.ndsu.edu/parking/
			NDSU ID (employee badge)	Assist employee with obtaining their NDSU ID card. NDSU Card Center – Memorial Union https://www.ndsu.edu/it/help/card_center/
			Meeting with Employee	Meet with the employee to discuss university and department protocol/information: <ul style="list-style-type: none"> • Information in Welcome Packet • Dress code • How to fill out time sheets, use KABA or other • Department hours and employee's work hours, lunch/break times (refer to Policy Manual) http://www.ndsu.edu/policy (Policy 137 Holidays; 213 Rest Periods; 214 Work Week) • Payroll schedule, overtime policy (if applicable), etc. (Policy 129 Salary Administration Policy, 212 Overtime) • Annual/sick leave policies and processes for requesting time off or reporting absences (Policies to reference: 130, 135, 139, 143, 146, 147, 149) • Customer service philosophy, response time and phone etiquette, culture, dept. mission • Department communication process, staff meetings, emails, etc. • Training (phone use, copy machine codes, programs, professional development) • Tuition waivers (Policy 133, 133.1) • Email is the Official Communication Method for Employees (Policy 158.1)
			Academic Oath (Faculty)	Have new faculty member sign the academic oath that is located at https://www.ndsu.edu/facultyaffairs/recruitment/faculty_appointments/ and put a copy in the personnel file.
Access and Authorization to Systems:				
			PeopleSoft Access – Finance	Prerequisite: PeopleSoft Data Privacy Training *New employees who require Accounts Payable entry access will be required to attend a training session with the PeopleSoft Financial Systems Trainer (Karen Blake) before any AP entry can be completed. For instructions on requesting access visit: http://www.ndsu.edu/peoplesoft/finance_security/ <ul style="list-style-type: none"> • To schedule training contact: <ul style="list-style-type: none"> Karen Blake Accounting Financial Systems Trainer 701-231-7433 mailto:karen.j.blake@ndsu.edu

Supervisor	Admin	N/A	Quick List	Details
			PeopleSoft Access – HCM	<p>Prerequisite: PeopleSoft Data Privacy Training https://blackboard.ndus.edu/ (you can also use your campus' Blackboard URL.)</p> <p>*Once logged in with the NDUS credentials:</p> <ol style="list-style-type: none"> 1. Select the Courses link on the left; 2. Locate and select the Course Catalogue link in the upper right. 3. In the search box type “NDUS Data Privacy” and select Go; 4. Hover your mouse over the course name to reveal a drop-down list; 5. Select Enroll; 6. Enter the enrollment key “NDUSDP”. This is case-sensitive and there should be no spaces; 7. Select Submit, OK. Follow the instructions on the pages. <p>Supervisor sends email to ndsuh@ndsuh.edu which includes:</p> <ul style="list-style-type: none"> • Roles the new user will need • Departments they need to access • Name (First, Middle Initial, Last) • Employee ID • Phone Number • Email Address
			PeopleSoft Access – Student	<p>Prerequisite: PeopleSoft Data Privacy Training https://blackboard.ndus.edu/</p> <p>*Once logged in with the NDUS credentials: 1. Select <i>NDUS Employee Development</i>; 2. Select <i>NDUS Data Privacy Training</i>. Follow the instructions on the pages.</p> <ul style="list-style-type: none"> • Contact: Registration & Records 701.231.7981
			Request Online Access to HCM-Recruiting Solutions	<p>Recruiting Solutions within HCM is the online hiring system. If applicable, the supervisor must send an email to request access to: ndsuh@ndsuh.edu. Include employee name, level access to be assigned, and department number(s) the user will need access to.</p>
			Self-Service	<p>Allows an employee to: view pay advice, benefits, personal information, leave accrual, etc.</p> <ul style="list-style-type: none"> • Employee receives email from the PeopleSoft Help Desk with instructions on how to claim the user ID and password (occurs after they have been hired into HCM) • Contact PeopleSoft Help Desk for login issues (866-457-6387) <p>*Self-Service guide: http://sits.ndus.edu/archive/connectnd.ndus.edu/fileadmin/connectnd.ndus.edu/PDF/Self_Service_Manual_-_Employee_090311.pdf</p>
Within the First Week				
			Review Position Description (PD). Submit signed PD to Human Resources (HR).	<p>Staff: Review Position Description/Duties/Responsibilities and then have employee sign the Position Description (PD) and submit it to Human Resources. (Related policies: http://www.ndsu.edu/policy Policy 101 Personnel Definitions, 101.1 Employee Group Definitions; Broadbanding Policy 241 www.ndsu.edu/broadbanding)</p> <p>Faculty: submit to Dean’s office for inclusion in official personnel file</p>
			Introduce new employee to Performance Review process	<p>Meet with Employee to discuss Performance Expectations</p> <ul style="list-style-type: none"> • Explain 6-month probationary period and extension option for cause (Related policy: http://www.ndsu.edu/policy Policy 222) • Review mission of the university and department and how missions relate to position • Review departmental operations • Discuss training process
			Emergency procedures	<p>Explain the emergency broadcast system, how it works, and what to do. Discuss other emergency preparedness procedures for your department.</p>
			Purchasing Card (if applicable)	<p>These are not applicable to all positions.</p> <ul style="list-style-type: none"> • Purchasing Policy, Agreement and User Manual http://www.ndsu.edu/purchasing/procurement_card/

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Training, Safety, Policy Review:				
			Mandatory Annual Trainings	More information to come as we are currently implementation a new Learning Management System
			Training for Specialty Areas	More information to come as we are currently implementation a new Learning Management System
			Quick List	Details
			Review NDSU Policies	Policy Manual: www.ndsu.edu/policy <ul style="list-style-type: none"> Reference key issues with FERPA, HIPAA, Acceptable Use & Confidentiality General policies (http://www.ndsu.edu/policy): Policy 151 Conflict of Interest; 158 Acceptable Use of Electronic Communications Devices; 161 Fitness for Duty; 169 Employee Misuse of Property Reports; 181 Resignation; 240 Changing positions; 406 Surplus Property; 700 Service & Facilities Usage; 710 Computer & Electronic Communications Facilities
			Grant Resources and Access	If you have questions or need assistance regarding research-related activities, please email NDSU.research@ndsu.edu or call 231-8045. For an overview of how NDSU research administration works, see the "Research 101" slideshow at: http://www.ndsu.edu/research/pdf/NDSUResearch101.pdf
On a Regular Basis				
			Be Available for Questions	Meet regularly to answer questions, schedule one-on-one meetings.
			Job-Related Behaviors	Document and address specific job-related behaviors, both positive and negative. Immediately provide feedback on areas for improvement as problems occur. Openly praise positive behavior and good performance. Please remember - annual reviews should never be a surprise. Have one-on-ones with your employees to ensure they know where they stand with performance.
			Job-Related Staff Issues	Related policies (http://www.ndsu.edu/policy): Policy 220, 232 - Job Discipline/Dismissal; Policy 156, 157, 230, 231 - Grievance & Appeal
Six Months (Staff)				
			Probationary Performance Review	Conduct 6-month probationary performance review. You will receive an email with the review form from HR prior to their 6 month probation: Policies 221 & 222 http://www.ndsu.edu/policy
Miscellaneous (add departmental specific items)				
			Junior Faculty Mentorship Program (Faculty)	Sponsored by the FORWARD group –contact: ndsu.forward@ndsu.edu
			Refer new employee to the Office of Multicultural Programs (OMP) for additional resources	Affinity Groups provide forums for employees to gather socially and share ideas outside their particular campus department. http://www.ndsu.edu/multicultural/affinitygroups/

A copy of this form should be provided to the new employee for their reference.