



New Hire Onboarding Checklist for Managers

Employee Name:	<input type="text"/>	Hire Date:	<input type="text"/>
EMPL ID:	<input type="text"/>	Department/Division:	<input type="text"/>

PRE-ARRIVAL

System Access:

- N/A: ePOI
 - If a new employee needs access to email prior to first day, the eFORMS initiator in the hiring department should submit an ePOI and HR will approve.

Workspace Setup:

- N/A: Locate/select workspace or office for new employee
- N/A: Contact FMC for furniture needs (from surplus). Main number: 281-283-2250
- N/A: Contact FMC for name plate ordering (if applicable). Main number: 281-283-2250
- N/A: Submit an [FMC workorder](#) for a cleaning of area (if applicable)

Technology Access & Equipment:

- N/A: Contact Office of Information Technology (OIT) for computer equipment surplus or to order new equipment. Main number: 281-283-2828 or supportcenter@uhcl.edu
- Add employee to relevant email lists

Office Keys/Building Access:

- N/A: An [Access Request Form](#) must be completed and approved. UHCL PD Technical Services will receive request and notify the employee or Security Delegate that the keys are ready for pick-up and that building access has been granted.

Office Supplies:

- N/A: Follow internal department procedures for ordering office supplies.

Onboarding Roadmap:

- Use the Onboarding Roadmap template to build a 30-60-90 day plan for your new employee. The assignments should allow for the progression of knowledge and skills.

FIRST DAY

Socialization

- Be available to greet the employee on the first day
- Introduce employee to others in the workplace.

Work Environment

- Show employee the e-Services PASS System

New Hire Onboarding Checklist for Managers

- For non-exempt employees, show the new employee how to clock in and out
- If the employee will be a TRAM approver, arrange for proper approval access through payroll and have them self-register for **TRAM for Managers I & II** training (CHR11 & CHR12) through PASS.
- Arrange for employee to retrieve any office keys from UHCL PD and ensure they received their employee ID card from Human Resources

- Provide department or building-specific safety and emergency information

- Meet with the employee for an Introduction Meeting; at a minimum, your agenda should address the following:
 - The first week's schedule and confirm required and recommended training
 - Overview of the functional area – its purpose, organizational structure, and goals
 - Review job description, outline of duties, and expectations
 - Job's role in the department and how the job and functional area contributes to the division and the university
 - Review hours of work. Explain policies and procedures for overtime, use of vacation and sick time, holidays, etc.
 - Go over the 30-60-90 day Onboarding Roadmap

- Send calendar invites for your 30, 60, and 90-day check-in meetings

FIRST WEEK

Schedule, Job Duties, and Expectations

- Give employee their first short-term assignment. This will give you an opportunity to give timely feedback to help them better understand the expectations.
- Provide additional contextual information about the department and organization to increase understanding of the purpose, goals, and initiatives. Use the [UHCL Strategic Plan](#) as a resource.

- Review the Probationary Period for Regular Staff Employees Policy ([02.A.18](#))

Technology Access and Related

- Ensure employee has fully functioning computer and systems access and understands how to use them.
- Show employee the [OIT Website](#) so they can explore available services and support options.

FIRST 30 DAYS

Schedule, Job Duties, and Expectations

- Continue to provide timely, ongoing, meaningful feedback
- Explain the annual performance review and goal-setting process. Submit a 'goals only' signed [Performance Evaluation Form](#) to Esther Herrera in HR.

New Hire Onboarding Checklist for Managers

- Meet for a 30-day check-in. Check the status of the 30-day tasks that were part of the Onboarding Roadmap; use the questions below to prompt discussion:
 1. Has UHCL met your expectations?
 2. What are some challenges you have had in your first 30 days? What would have helped?
 3. What is it about your position that you are enjoying the most? Is there anything about your position that you don't understand?
 4. What are some of your strengths that you feel have helped you be successful in the past 30 days?
 5. Is there anything about your role that is worrying you?
 6. What do you need from me?

Socialization

- N/A: For full-time employees: Ensure employee has attended (or will attend) a University Staff Association meeting
- Continue introducing employee to others at UHCL and bring them to relevant events

Training and Development

- N/A: For full-time employees: Ensure employee has received invitation for New Employee Orientation with HR Training & Development
- N/A: Ensure employee is signed up for necessary training; see the [UH System Online Training Checklist](#) for a list of role-specific courses

FIRST 60 DAYS

Schedule, Job Duties, and Expectations

- Continue having recurring one-on-one meetings
- Continue giving employee assignments that are gradually increasing in scope and skill requirements
- Meet for a 60-day check-in. Check the status of the 60-day tasks that were part of the Onboarding Roadmap; use the questions below to prompt discussion:
 1. Since our last 30-day review, what business skills have you worked to strengthen?
 2. Do you have a work contribution from the last 30 days that you are proud of? Why?
 3. Do you feel your first 30 days helped prepare you for the next 30 days? If not, what would have helped?
 4. How would you describe your role to others?
 5. What do you need from me?

FIRST 90 DAYS

Schedule, Job Duties, and Expectations

- Continue having recurring one-on-one meetings
- Continue giving employee assignments that are gradually increasing in scope and skill requirements

New Hire Onboarding Checklist for Managers

Meet for a 90-day check-in. Check the status of the 90-day tasks that were part of the Onboarding Roadmap; use the questions below to prompt discussion:

1. How would you rate yourself at doing the job?
2. Are there any skills of yours that we are under-utilizing?
3. What has been most helpful during your learning process?
4. Is there any additional training that you need right now?
5. What do you need from me?