



CALIFORNIA
STATE UNIVERSITY
NORTHRIDGE

OnBoarding Staff Manager Checklist

Name: _____ Start Date: _____

CSUN ID# _____ Email: _____

Pre-Arrival | Before the Employee's Start Date:

Communication Item:

- Review the copy of the confirmation email the new employee received from HR
- Call employee to convey welcome and reporting information.
 - Encourage employee to complete [Sign-In documents](#) beforehand to bring with them to campus.
 - If they will be new to the area, are there resources you can help identify to make their transition smoother.
- Send employee a follow-up email conveying welcome to team, connection to mission and first day important information:
 - Where and when to report with location
 - HR Monday Morning Orientation
 - Remind them of [Forms of Identification](#) needed for sign-in
 - Attire (See Day 1)
 - Parking (with link to [campus map](#))
 - First day lunch (See Day 1)
 - Provide link to [Organizational Chart](#) or key directories
 - Campus | Department | Division
- Have the department/division head send a letter communicating welcome and importance of position and connection to mission. (See Sample)
- Communicate to staff the new hire's start date, background, key responsibilities, work location, and contact information

Planning Item:

- Have department web-site updated
 - Add to department directory
 - Add to relevant list-serv/email-groups
- Arrange 1st day meet & greet and lunch
- Schedule Department, Building & Division Tour
- Schedule Campus Tour
 - Who will provide it: Manager, Designee or Outreach & Recruitment

- Develop a training schedule that spans the first week or two. Avoid any overload of training on the first day.
 - Identify individual(s) who will provide training of day-to-day activities
 - Identify what department, division or university events are taking place in the first 30 days that the new employee should attend
- Plot out mandatory/compliance training
 - Review compliance/mandatory training to be completed:
 - Data Security and FERPA Training (All Employees) should be completed on Day 1
 - All other online compliance training should be completed within first week:
 - CSU's Discrimination, Harassment and Sexual Misconduct Prevention Program (Non-Supervisory Employees)
 - CSU's Sexual Misconduct Prevention Program (Required of Supervisors Only, including supervision of student workers)
 - CSU's Discrimination and Harassment Prevention Program (Required of Supervisors Only, including supervision of student workers)
 - Injury and Illness Prevention Program (All Employees)
 - Identify role specific training:
 - ProCard / Procurement
 - Defensive Driver Fundamentals
 - Conflict of Interest
 - Other
- Identify team standing meetings – include the meeting title and recurring dates
- Schedule meetings with members of the unit team for acculturation and learning
- Identify shadowing opportunities for new hire to attend with direct manager or other team members
- Determine a schedule for recurring check-in meetings
- Identify university colleagues that the new hire should meet. Pre-schedule those that should take place during the first two weeks
- Choose one important, easy win project for the employee; Plan to discuss on the first day and have employee begin to work on during the first week.
- Look at the [HR Professional & Personal Development Training Calendar](#) and identify what upcoming trainings would be beneficial.

Action Item:

Work Space

- Clean work area and set with supplies
- Set up computer hardware, software and accessories calendared/set up
- If starting multiple employees on the same day or close together, consider that all employees are treated equally.

- If your new employee is a CSUN graduate, they're now part of CSUN's "Home Grown" community. Alumni Relations will reach out to the hiring manager and arrange to have a "Home Grown" welcome token/item delivered within the first two weeks.
- Prepare to order Business Cards, Nameplate as appropriate.

Access

- Get keys, Omni Codes – Items necessary for physical access
 - Arrange phone and voicemail set-up with IT (allow 2 business days)
 - Reset name and code
 - Establish access to shared drives
 - Link computer to shared printers, etc.
 - Complete [Application Access Request Link](#) as necessary in the Information Security pagelet for access to SOLAR, On-Base. May need to be coordinated with designee in your area with access to these links.
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Day 1:

Communication Item:

- Discuss:
 - Culture of the office, division
 - Who's Who and reporting structure
 - Attire
 - What and What Not To Wear Guidelines
 - [Matatude Tuesday](#)
 - Office supplies
 - Compliance Training
 - Attendance
 - Sick leave, vacation
- Discuss and plot out first two weeks
 - Use meeting and training schedules developed earlier
- Discuss and plot out first project
- Discuss and review:
 - How to report an emergency (911)
 - How to report a facilities issue/concern (2222)
 - Have employee view [CSUN Active Shooter & The Survival Mindset video](#).
 - Building Evacuation
- Confirm Data Security Training is complete (If access available)

Action Item:

- Meet / Greet the employee in person
- Escort the employee to Human Resources (UN 165) at 8:30 AM to complete the Sign-In Process
- If employee does not yet have a CSUN ID Card / Photo, it can be obtained at Admissions & Records after completing Sign-In at Human Resources.
- Have the employee obtain parking arrangements (as needed)
 - A CSUN ID is needed to purchase a long-term parking permit
- Provide a tour of office with introductions to office-mates and persons identified to be shadowed or assist in training. (See Work Location Tour Pointers)
- Arrange to have lunch with employee or employee with colleagues
- Provide employee with copy of Position Description**
 - Begin discussion on expectations around the job and its responsibilities.
 - This is also a good time to cover other behavioral expectations and office culture.
- Obtain and Record Contact and Emergency Contact information
- Allow non-structure time for the employee to become familiar with or set-up their work area.
- Meet with the employee toward the end of the day for check-in.

Office Access & Equipment

- Sign-Out keys, Omni Codes – Items necessary for physical access
 - Building, Office, File Cabinets
 - Review phone and voicemail set-up
 - Reset code
 - Review email and calendaring system and office practices
 - Provide list of and instructions for shared drives, and list serves
 - Provide for instruction on use of office equipment (copiers, printers, etc.) and inter-office and external mail.
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Week One:

- Establish weekly or bi-weekly meeting dates/schedule.
 - Before the end of the first week, find time to connect and check-in with the employee. Some possible discussion points:
 - What could we do (have done) to make you feel more welcome?
 - If I'm not available, who do you talk to if you have questions about work? Do you feel comfortable asking questions?
- Continue discussion on expectations
 - **Have employee sign and return copy of Position Description (Maintain original and send signed copy to HR).**
 - **Discuss and provide copy of performance evaluation form and schedule.** Not required for Temporary/Emergency Hire positions.
 - Have employee familiarize themselves with the campus priorities and begin a discussion of how the department/division connect with these.
 - Inform your new hire of team goals and objectives
 - Debrief your new hire on current and upcoming projects
 - If employee is part of Business Continuity Plan, discuss plan and explain expectations.
- Accompany employee to standing meeting(s) that are part of their position, and introduce to others
- Schedule one-on-one introductory meetings with key team members
 - Ask team members to provide a short description of their work and how it will integrate with the new employee's role.
- Manager and new hire complete first week check-in
 - **Confirm mandatory/compliance training is complete**
 - CSU's Discrimination, Harassment and Sexual Misconduct Prevention Program (Non-Supervisory Employees)
 - CSU's Sexual Misconduct Prevention Program (Required of Supervisors Only, including supervision of student workers)

- CSU's Discrimination and Harassment Prevention Program (Required of Supervisors Only, including supervision of student workers)
 - Injury and Illness Prevention Program (All Employees)
 - Has the employee completed signing up for Benefits?
 - Has the employee been instructed on how to report absences or trained to enter absences in Time & Labor Module?
 - Outline plan for remainder of the first 30 days
 - Continue the discussion to build a connection. Some possible discussion points:
 - How does the job compare to your expectations?
 - Do you have all the tools and equipment you need to do your job? If not, what do you think would help?
 - Review:
 - Pay Warrant distribution process
 - Department emergency action plan
 - Contact your building marshal if needed.
 - Emergency Desk Reference for Students, Faculty & Staff
 - CSUN & CSU Policies & Procedures
 - Human Resource Functions:
 - How to request time away
 - How and when to self-report, record and submit time
 - Self-Reporter
 - Department Timekeeper
 - How to view balances
 - Absence Management Role (as applicable)
 - Department File Storage system (On-Base, etc)
 - Acquiring/requesting office supplies
 - Review Procurement policy and instructions (as applicable)
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First Month: First 30 Days

- Hold weekly or bi-weekly meetings
- Manager and new hire discuss employee's perceptions and performance, strengths and areas for development
 - Review the Position Description and Performance Evaluation Document and discuss the evaluation criteria the employee will be evaluated on for the 90 day review and forward.
 - Collaboratively build an individual development plan to guide skill and competency building over the performance evaluation period

- Jointly assess whether there is a colleague on campus that the new employee has not yet met that they will need to interact with
 - Review campus priorities, culture and management philosophy
 - Has the employee been scheduled to attend New Employee Welcome Orientation? If not, reach out to Human Resources.
 - Toward the end of the first month, some possible discussion points include:
 - Is there anything you need that you don't have access to?
 - Is there anything you don't understand about your job responsibilities or about the department/division/university?
 - Is there anything you would like to share with me that I've not asked about?
 - Is there one or several colleagues who has been most helpful to you?
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Second Month: First 60 Days

- Manager and new hire discuss employee's perceptions and performance, strengths and areas for development
 - Assess training progress and discuss the need for any specific training.
 - Possible discussion points include:
 - What sources have you found useful for information about the department and your work?
 - How can I be helpful to you?
 - If you could change one aspect of your experience in the department thus far, what would it be?
 - Continue discussion of campus priorities, culture and management philosophy
 - Has the employee attended New Employee Welcome Orientation?
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Third Month: First 90 Days

- Possible discussion points during this period include:
 - In what areas would additional training be helpful to you?
 - On which aspects of your job performance would you like more feedback or support?
 - Do you have any concerns about your job that I could address?
 - Looking back, is there anything that you think we should change to help new staff during their first week/few weeks on the job here? Tell me why we should make that change.
- **Manager and new hire complete performance evaluation form and submit to HR.**
 - **Be sure to maintain originals and send copies to HR.**
 - Review performance accountabilities for the position

Sixth Month: First 180 Days

- Manager and new hire complete performance evaluation form and submit to HR.**
 - Be sure to maintain originals and send copies to HR.**
 - Review performance accountabilities for the position
 - Review the individual development plan to guide skill and competency building over the performance evaluation period.

Eleven Month Review:

- Manager and new hire complete performance evaluation form and submit to HR.**
 - Be sure to maintain originals and send copies to HR.**
 - Review performance accountabilities for the position
 - Review the individual development plan to guide skill and competency building over the performance evaluation period.
- Discuss probationary status.
- Begin conversation with employee to plan goals for the coming year.

Twelve Months:

- Recognize the new employee's anniversary!
- Meet with the employee to continue discussion of and finalize goals for the coming year.
 - What additional resources might the employee need?
 - What opportunities are there for the employee to be more engaged with the department, division, and campus?