

Northwestern | HUMAN RESOURCES

Manager Checklist:

Before Start Date:

Review the [Guiding Principles of Onboarding](#) as you prepare to welcome your new employee.

Call or email (*sample email template available in the [Managers Resource Guide](#)*) to officially welcome your new employee after acceptance confirmation. Discuss dress code, working schedule (include your team's [workplace strategy](#)), [parking information](#), and where you will meet on the first day. Confirm start date. Provide new employee with your department's point-of-contact information.

If your new employee needs caregiving support (for childcare or adult senior care), they can explore [Caregiving Resources](#) and schedule a consultation with a [Dependent Care Specialist](#) prior to their start date.

Send an email announcement to the department team announcing the new hire and start date (*sample email template available in the [Managers Resource Guide](#)*) ask staff to add new employee to contact lists and email distribution lists, Teams group, etc.

Confirm and/or send out the NETID activate email to new hires. This email will be sent directly to the NETID coordinator assigned to your department. The NETID coordinator should be sending the activation email to the new employee.

Departmental IT computer set up (Note: NETID is required for set up).

Provide [key/access card](#) to office. Put in a request using [Facilities connect](#) (Note: NETID is required).

Prepare the new employee's workspace. Ensure it is clean and has all needed equipment and supplies (computer, phone, office supplies etc.).

Communicate approver contacts to the assigned Talent Acquisition Partner: Reports to, Conflict of Interest (COI), Performance Evaluation, Training, Leave Accrual, and Expense.

Customize an onboarding schedule for the new employee's first week. Look at the suggested topics to cover in this checklist for the first day and post hire and make a plan. Consider how you might involve your team and if applicable, the Peer Partner in the onboarding schedule and associated tasks.

Assign an onboarding Peer Partner (*access the Peer Partner Best Practices and Resources in the [Managers Resource Guide](#)*) and discuss your expectations with the Peer Partner.

Review the Ideas for Welcoming Your New Employee Resource (see the [Managers Resource Guide](#)) to consider ways to personalize the onboarding experience for your new employee

First Day:

Ensure you or someone from your team meets your new employee when they arrive.

Introduce the new employee to co-workers and provide department tour.

Provide an office tour (show the new employee their workspace, location of important office items/supplies, phone, fax, copier, and how to route to printer if applicable).

Departmental IT computer set up if not already completed as part of pre-arrival tasks.

Discuss [University Policy and Procedures](#), [time off](#), unexpected absences procedures, and [time entry procedures](#).

Review [work schedule](#), [pay schedule](#), and overtime policy (if applicable).

Remind new employee to complete benefits enrollment within 31 days of employment. Ensure they are enrolled in the virtual benefits session.

Ask your new employee about their [Wildcard](#) status and follow up as necessary.

Complete and submit security access forms (as applicable to role):

[Student Enterprise Systems \(SES\)](#)
[Finance, Facilities, and Research Administration \(FFRA\)](#)
[myHR](#)
VISTA deployment
Cognos BI Position Management

Check in with your new employee and celebrate their first day. *Ask* how their first day went, about their general impressions, and how you might help them in the weeks ahead.

First 2 Weeks:

Check in with your employee to see if they have been automatically enrolled for the New Employee Orientation. *Note: Automatic enrollments should occur within a week of the new employee's start date. If you do not see an enrollment in myHR Learn for your new employee, or your employee wants to attend their orientation on a different campus, please reach out to workplace-learning@northwestern.edu.

Review [University Leadership](#), [University Org Chart](#), and School and Unit Org charts as applicable.

Review [University Standards for Business Conduct](#).

Provide an overview of budget and finance procedures and policies (if applicable).

Encourage your new employee to explore the [Staff Affinity Groups](#).

Encourage and support your new employee to spend time exploring the University, meeting with peers, teammates, etc. to build awareness and their network.

Discuss your style and expectations as a manager and your communication preferences (face to face, email, Teams messages, etc.).

Provide an overview of your team norms (i.e., team user manual) and team communication preferences.

Set up meetings with key people that will help your new employee get acclimated to their new role.

Introduce and provide an overview of:

[myHR](#)

myHR Learn

The [Performance Excellence \(PEX\) process](#) and [staff member resources](#) available

Review the new employee's role and job responsibilities. Clarify performance objectives and expectations.

Establish a 1:1 meeting cadence between you and the new employee.

First 30 days

Ensure your new employee attends the in-person New Employee Onboarding Session I and is enrolled for Session II.

Check in with your new employee. *Acknowledge and validate* that they have taken in a lot of information and it takes time to get acclimated. Reassure them that its ok to

ask questions and it will take time to feel fully integrated in their role. *Ask* them about their experience so far: what has been their biggest learning status of new employee checklist items, alignment with onboarding peer mentor, and how you can support them. *Answer* any questions they might have.

Within 60-90 days

Discuss the [Individual Development Plan](#) with your new employee and discuss timelines for follow on [Career Conversations](#).