

Northwestern

Onboarding Checklist

Employee Name: _____ Employee ID: _____
Department: _____ Email: _____
Position Title: _____ NetID: _____
Supervisor: _____ Start: _____

Pre-Arrival

Employee

- Sign and return offer letter to HR and initiate background check.
- Complete and return [Personal Data Form](#).
- Review [Payroll Forms](#).
- Complete Section 1 of the employment verification by going to the [I-9 Service Center](#) and following the instructions for new employees.
- Activate [NetID](#) online. It must be activated before you can use it. You will be notified when your NetID has been created and you can begin the staff activation process.
- After you receive your Northwestern NetID, you have an opportunity to submit your WildCARD [photo online](#) for a more convenient card pickup.
- Nonresident Alien:** Contact the [International Office](#) at (847) 491-5613. Contact Payroll office to register to use the Foreign National Information System. [More Information](#)
Evanston Payroll Office: (847) 491-7362 | Chicago Payroll Office: (312) 503-9700

Hiring Manager/Department

- Confirm offer letter sent to new employee.
- Call to officially welcome new employee after acceptance confirmation. Discuss dress code, working hours, [parking information](#), and where to go on first day. Confirm start date.
- Send an email announcement to department announcing the new hire and start date.
- Provide new employee with department's point-of-contact information.
- Communicate approver contacts to the assigned Talent Acquisition Partner: Reports To, Conflict of Interest (COI), Performance Evaluation, Training, Leave Accrual, and Expense.
- Create [onboarding schedule](#), and assign an onboarding peer.
- Set up new employee's office and space, computer, phone, log in password, office supplies, office keys or electronic [building access card](#), etc. Submit a Facilities Management (FM) [Planning Space Request Form](#) to alert FM Planning of an upcoming need for new space or modification.
- [Order business cards](#).

Human Resources

- Send welcome email to new employee. (Hiring manager/department is copied.)
- Enter new employee's information into myHR to create NetID, email address, and employee ID. (Notifications are sent to the department NetID coordinator.)

First Day

Employee

- Visit HR Staffing Office to complete [HR Payroll Forms](#) and [I9 verification](#).
View list of [acceptable documents](#). Review new hire information: Tax Forms, I9, Staff Handbook, Benefits Packet, Orientation(s).

Evanston HR Staffing Office

1801 Maple Avenue, 6th Floor, Evanston

Chicago HR Office

710 North Lake Shore Drive, Suite 150, Chicago

- Obtain [Wildcard](#). Your employee ID and NetID are required.
- If interested in a monthly parking permit, please visit the [parking website](#) for more information.
- Sign up for [CTA or RTA benefits program](#) (if applicable).

Hiring Manager/Department

- Introduce to co-workers and provide department tour.
- Provide [key/access card](#) to office.
- Discuss [time off](#), [policies](#), unexpected absences procedures, and [time entry](#).
- Review work schedule, [pay schedule](#), and overtime policy (if applicable).
- Review job responsibilities, competencies, and individual and team expectations.
- Review department's mission, strategy, values, policies and procedures, emergency regulations, and safety plans.
- Go over phone, fax, copier, and office supplies.
- Departmental IT computer set up.
- Remind new employee to complete benefits enrollment within 31 days of employment.
- Complete and submit applicable [security access forms](#):
 - Student Enterprise Systems (SES)
 - Finance, Facilities, and Research Administration (FFRA)
 - myHR
 - VISTA Deployment
 - Cognos BI Position Management.

Human Resources

- Collect new employee forms.
- Provide Employee Handbook and Benefits packet to new employee.

First Week

Employee

- Enroll in relevant [training and workshops](#).
- View [New Employee Orientation Part 1 Online Module](#) in myHR Learn.
- Arrange a [campus tour](#) (optional).
- Familiarize yourself with the [Staff Handbook](#), then access [myHR](#) and select “Attestations” to acknowledge receipt of the Staff Handbook.
- Familiarize yourself with the [Policy on Reporting Suspected Child Abuse and Neglect](#), then access [myHR](#) and select “Attestations” to acknowledge your status as a mandated reporter.

Hiring Manager/Department

- Review feedback and [Performance Excellence](#) process.
- Review University [Standards for Business Conduct](#).

Within Two Weeks and First Month

Employee

- Attend [New Employee Orientation, Part 1: Benefits](#).
- Enroll in [employee benefit plans](#).
- Complete the online courses [Safe Campus](#) and [Harassment and Discrimination Prevention](#). (Email notification from myHR Learn is sent Wednesday mornings, shortly after hire.)
- Enroll in [New Employee Orientation, Part 2](#).
- Enroll in other elearning(s) related to job in [myHR Learn](#):
 - Family Education Rights and Privacy Act (FERPA)
 - Procurement and Payments
 - Other relevant regulatory compliance training.

Hiring Manager/Department

- Overview budget and finance procedures and policies (if applicable).
- Review/clarify performance objectives and expectations.

Notes

Within Six Months

Employee

- Attend [New Employee Orientation, Part 2](#).
- Review performance objectives and progress.
- Discuss completed training and future training needs.

Hiring Manager/Department

- Review performance objectives and progress.
- Conduct annual [performance review](#).
- Set objectives for coming year with employee.

Notes