UNIVERSITY ONBOARDING GUIDELINES CHECKLIST

PART 1: BEFORE DAY ONE
PART 2: UNIVERSITY ORIENTATION
PART 3: DAY TWO AND BEYOND

BEFORE DAY ONE
☐ Designate workspace
☐ Evaluate current office, computer, and phone technology; and reimage via IT
☐ If needed: Requisition new technology (Give at least 2 weeks lead time to receive equipment)
☐ Contact HR before extending an offer for approval of salary and start date; contact HR Consultant with offer details once verbal offer is accepted in order to generate written offer and begin hiring process
☐ When extending verbal offer inform the new employee about provided technology and workspace provided
☐ Complete a status form and send it to Human Resources
☐ Create schedule for departmental “Meet and Greets”
☐ Assign a departmental onboarding mentor/buddy
☐ Require new staff member to visit HR (JH 037) at least 7 business days before start date to complete I-9 and new hire paperwork, if necessary (by appointment only through request at askhr@butler.edu)
☐ It is suggested that the manager sends a welcome letter or email 5 Business Days before start date
☐ Contact the University locksmith at ext 9262 to request keys
☐ Arrange for office supplies, business cards, name tag (if needed)
☐ Arrange to have lunch on the second day (if within budget)
☐ Display name on work station (even if on paper)
☐ Leave a welcome note or card from team members in the new hire’s work area
☐ Discuss work schedule
☐ Prepare goals and expectations for first 90 days and the year
☐ Prepare a training plan
☐ Give clear directions to the department and where to park

ON DAY ONE (UNIVERSITY ORIENTATION)
☐ New hire attends University orientation
☐ Butler University 101
☐ General Counsel
☐ Human Resources
☐ Public Safety
☐ Benefits
☐ New hire visits department
☐ Introduce to co-workers and take to workspace
☐ Tour of area, copier, bathroom, etc.
☐ Rules for decor
☐ Provide info for Day 2
☐ Provide keys (Contact Facilities)
☐ Discuss dress code; distribute uniform, if necessary
☐ Discuss any department related information

ON DAY TWO
☐ Introduce to others in the department (If not done on Day 1)
☐ Demonstrate operation of equipment
Discuss procedures and staff meeting
Customer service philosophy
Discuss department celebrations and activities
Share departmental goals
Review job description (duties, responsibilities, performance standards)
Discuss Performance Review cycle
Outline goals for the review cycle
Supervisor discusses leadership style, how to best escalate, and communicate
Show organizational chart
Explain hours/schedule/meals/breaks/overtime policy/flextime policy, as applicable
Explain salary/pay rate and time reporting system
Explain pay days, vacation time, sick leave, personal days
Discuss confidentiality practices
Provide any applicable procedural manuals
Provide office supplies and explain ordering procedures
Update Butler Email Signature
Get Butler ID and parking pass at Parking Services
Update directory profile
Review and update demographic information through self-service at my.butler.edu

DURING FIRST WEEK
Schedule regularly recurring 1 on 1 meeting to discuss questions and give feedback
Provide procurement card (if applicable) and provide university procurement policy
Explain campus mail system
Explain telephone procedures and set up voicemail password and message
Discuss policies on use of computer, email, fax, copier, etc.
Describe call-in procedures for absences
Explain clerical support/reception area
Discuss timing of staff meetings
Discuss office safety/security issues
Explain the building’s emergency plan
Share organizational publications
Explain Staff Assembly
Describe other staff activities
Explain time-off request procedure
Discuss the Butler Beyond campaign and vision

Office/Workplace Tour
Introductions (spaced over time to prevent overload)
Vending machines
Building entrances
Locations of nearby departments
Bulletin boards and other sources of information
Break area
Stairs and elevators
Conference areas
Files
Storage

First 90 Days
Complete 90 working day evaluation