

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