



New Hire On-boarding Checklist

Hiring Manager Toolkit

From pre-arrival preparation through their first 90 days,
the **New Hire Onboarding Checklist**
will set you and your new hire up for success.

NEW HIRE ON-BOARDING CHECKLIST

Employee Name: _____

Manager: _____

Start Date: _____

PRE-ARRIVAL

After the offer is accepted

Communicate

- Welcome email / call** – Share your excitement about accepting the position. (see [Talking Points](#))
- Stay in touch** – If your new hire isn't starting for a few weeks, keep in touch. (see [Ideas](#))
- Share the news** – Tell your colleagues (*confirm that your new hire has made their news public before you share*).

Prepare

- Notify Facilities** – Request office keys and furniture set-up. (see "[Facilities Requests](#)")
- Notify Technology** – Request equipment / first day set-up (in person/virtual). (see "[Technology Requests](#)")
- Plan first few weeks** – Who should they meet with and what should they learn? (see [Sample](#))

One week before start date

Prepare

- Set-up work area** – Remove old papers and supplies and put out new supplies, Simmons swag (coffee mug, notebook, pen), [Campus Map](#), department directory, [Technology Quick Reference Guide](#) (pdf).
- Invite to meetings** – Add them to recurring department meetings and schedule weekly 1:1s.
- Finalize orientation agenda** – Confirm trainers are prepared for their sessions and send calendar invite (include zoom links where appropriate)
- Send reminder email** – About two days before the start date, remind your new hire of the date, time and location for their first day. Attach a copy of their orientation agenda (see [Sample](#)).

WEEK ONE

Day 1

	New Hire Basics	Simmons Basics	
Review	<p>Technology Basics</p> <ul style="list-style-type: none"> Access to email Shared folders & drives Workday & new hire to-dos Directory & contact info 	<ul style="list-style-type: none"> Internal resources (intranet) Orientation agenda & meetings Ordering supplies Commuting, Masco Shuttle, Longwood area Hours, overtime (if applicable) 	<ul style="list-style-type: none"> Mission & Community Values Forms & Policies (dept. & University) Events on campus Holiday & Payroll schedules Public safety & emergencies

Introduce

- Share the news** – Announce your new hire's arrival and role and share their contact information.
- Take a tour** – Complete their I-9, get Simmons ID, find closest restroom and coffee shop.
- Grab a bite** – Take them (and a few colleagues) out to lunch.

Days 2-5

- Review**
 - Set expectations** – Review their job description, working hours, set goals for the first few weeks,
 - Check-in daily** – Check in at the end of the day. Do they have what they need? How is training going? Make sure they've completed their Workday new hire to-dos and their EverFi Training (see below).
 - Assign projects** – Giving one to two initial projects will engage them and provide ownership early on.
 - Department operating rhythm** – Review department processes, collaboration, goals, mission, and culture.
 - Workday** – "[How To](#)" **Guide** (e.g., expense reports, purchase orders, requesting time off, etc.).
 - Note important training(s)** – EverFi Digital Modules.
 - Review safety** – fire drill route, public safety number contact info, etc.
 - Managers only** – If your new hire is a manager, review [Manager Resources](#) (e.g., time off approval, etc.).

EMPLOYEE MILESTONES

Key milestones for your new hire to reach within their first 3 months

30 days: Learn

- ✓ Complete new hire trainings
- ✓ Integrate into Simmons community
- ✓ Understand role & responsibility
- ✓ Establish a routine

(see [sample](#) for more ideas)

60 days: Act

- ✓ Connect & collaborate with colleagues
- ✓ Give & receive feedback
- ✓ Take on more assignments
- ✓ Establish performance goals

(see [sample](#) for more ideas)

90 days: Advance

- ✓ Operate independently
- ✓ Understand the “big picture”
- ✓ Take initiative
- ✓ Generate new ideas

(see [sample](#) for more ideas)

WELCOME EMAIL / CALL “TALKING POINTS”

Timing: Immediately after the offer is accepted

- Congratulate your new hire – emphasize the department’s excitement for their arrival
- Share that you are working on an orientation agenda and training for their first few weeks
- Confirm start date, time and location (provide zoom link for fully remote employee)
- Discuss:
 - Lunch plans for their first day (confirm any dietary restrictions); or time 1-1 or with team for social interaction (get-to-know one another)
 - Encourage them to complete their SharkPass and Workday set-up before day one (they will receive email notifications to do so)
 - Confirm that your new hire has given notice to their current employer and that their news is public

STAY IN TOUCH IDEAS

1. **Email** – Reaching out via email is the quickest and easiest way to stay in touch with your new hire before they start.
 - **Frequency** – Your new hire probably has a lot to do before their first day. Staying in touch keeps them engaged and excited to start their new position. However, it’s great to be mindful of over communicating.
 - **Style** – Keep communication short and simple
 - **Send hyperlinks** – Get them connected! Share [recent news at Simmons](#) and [Simmons social media accounts](#)
2. **Give Simmons swag** – You can leave these items on their desk for their first day, or if they aren’t starting for a few weeks or work fully remote, sending a welcome package to their home is another great way to welcome them.
3. **Introduce** – Encourage your colleagues, especially those who will work closely with your new hire, to send them a welcome email. Take it one step further and create a [Kudoboard](#) for your new hire. Ask your colleagues to post welcome notes, tips and advice.

FACILITIES REQUEST

Notify [Facilities](#) of your new hire as far in advance as possible to ensure that your new hire’s work space is set up and configured before their first day.

1. **Set-up:** Review the typical office set-up in the [Simmons Office Standards](#) guide. If additional resources or set-up is required, submit a [Space Request Form](#).
2. **Work Request:** Submit a [Work Request](#) if the work space needs repair, cleaning or configuration.
3. **Key Request:** If your new hire has an office, submit a [Key Request form](#) for a new set of office keys.

TECHNOLOGY REQUESTS

1. Go to <https://servicedesk.simmons.edu> and enter a “[General Support Ticket](#)”
2. Answer required fields
3. Select “I’m making a request”
4. In the **Summary** section type: “*New Simmons Employee: First Name Last Name*” (e.g, “New Simmons Employee: Stormy Shark)
5. In the **Description** section, copy and paste your answers to the following questions:

Question	Possible Answers	Example
<u>Name:</u>	<i>Legal first and last name (per offer letter)</i>	Stormy Shark
<u>Department:</u>	<i>Your department</i>	Human Resources
<u>Location:</u>	<i>Office or desk location and suite number</i>	MCB C210-E
<u>Title:</u>	<i>Employee’s title (per offer letter)</i>	Project Manager
<u>Start Date:</u>	<i>Employee’s first day (per offer letter)</i>	July 1, 2022
<u>Type:</u>	<i>Faculty or Staff</i>	Staff
<u>Mobility/Remote</u>	<i>What percentage of time will the employee work away from their desk and require access to technology (e.g, in conference rooms)?</i> <i>Request a Simmons phone number to be assigned to a fully remote employee.</i>	50% / Need laptop shipped to fully remote employee. Need Simmons phone number for new remote employee to set up twinning.
<u>Special Requests:</u>	<i>List specific software or applications that your new hire will need to perform their job</i>	Not applicable
<u>Training:</u>	<i>Request a Technology representative to help your new hire log in and familiarize themselves with their equipment on day one</i>	Request Technology training at 10 a.m. on August 27, 2018

6. Optional: Upload attachments
7. Click Submit

Important: Don’t forget to request access to specific drives and folders that your department uses by completing the [Systems Access Form](#).

ORIENTATION AGENDA

Creating an Orientation Agenda for your new hire, such as the sample on the following page, gives structure and organization to their first few weeks. While creative license is encouraged with the layout and design, it is recommended that you include the following details:

Date	Time	Meeting Description	Owner	Location
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Strong Orientation Agendas will include a mix of the following:

- **Trainings** – Schedule trainings and meetings through a variety of mechanisms: in person, web conferences, or self-paced research/learning.

- **Breaks** – Starting a new job can feel like information overload at times. Give your new hire ample breaks to settle in, get organized, review what they have learned and come up with questions.
- **Relationship Building** – Introduce your new hire to their colleagues, department and Simmons overall. Set up lunch and/or coffee meetings to help them develop their social network on campus. Consider pairing your new hire with a peer from a different department – reach out to Human Resources for recommendations!

Feel free to copy and paste the following template into a Word document to build your new hire’s orientation agenda. Don’t forget to include the **benefits/hr orientation meeting** as listed in their offer letter.



FIRST NAME LAST NAME
Orientation Agenda

Monday, July 6, 2022

9-9:30 a.m.	Welcome and Introduction	<i>First & last name, title</i>	<i>Office number</i>
9:30-10 a.m.	Technology Training	<i>First & last name, title</i>	<i>Office number</i>
10-10:30 a.m.	I-9 Verification & Simmons ID	<i>First & last name, title</i>	<i>Office number</i>
11 a.m.-12 p.m.	Review: New Hire and Simmons Basics	<i>First & last name, title</i>	<i>Office number</i>
12-1:15 p.m.	Team Lunch	<i>First & last name, title</i>	<i>Office number</i>
1:15-2 p.m.	Settle-in	Self-paced	Your desk
2-2:45 p.m.	Campus Tour	<i>First & last name, title</i>	<i>Office number</i>
2:45-3:45 p.m.	Department Meeting	<i>First & last name, title</i>	<i>Office number</i>
4:30-5 p.m.	Day 1 Check-in	<i>First & last name, title</i>	<i>Office number</i>

Tuesday, July 7, 2022

10-11:00	Complete EverFi/Get Inclusive Online Modules	<i>Self-paced</i>	Desk
2-3 p.m.	Benefits & New Hire Orientation Meeting	<i>Christina Webber, Benefits Manager</i>	TBD
3:00 - 4:00	Community Meeting	<i>Full Community</i>	Virtual

Wednesday, July 8, 2022

<i>Time</i>	<i>Meeting Description</i>	<i>Owner</i>	<i>Location</i>

Thursday, July 9, 2022

Friday, July 10, 2022

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FIRST DAY REMINDER EMAIL

Sending a first day reminder email to your new hire two to three days before their first day helps them prepare. Additionally, giving them insight into what their first few weeks will look like increases engagement and shows that you thoughtfully planned for their arrival. A sample email is included below with recommended topics to share with your new hire. It is highly recommended that you attach a copy of their Orientation Agenda to this email. Fields **bolded** and in **yellow** should be replaced by the relevant information. Feel free to copy and paste the table below into an email and use it as your template.

Simmons

UNIVERSITY

Hi **(FIRST NAME)**,

We are really looking forward to your first day. This email includes important reminders and helpful tips to prepare you for Day One. Please do not hesitate to reach out if you have any questions.

Best,

(YOUR NAME)

(YOUR CONTACT INFORMATION)

We will start your first day this coming **(DATE)** at **(TIME)** in the **(OFFICE NAME)** office. **(OFFICE NAME)** is located in **(BUILDING NAME)** on the **(FLOOR NUMBER)** floor. You can reference the Simmons Campus Map [here](#).

Day One

If you haven't already completed your I-9 form remotely, you will need to go the HR office in the Main Campus Bldg (2nd Fl). In order to do so, please bring acceptable forms of identification as outlined by the U.S. Citizenship and Immigration Services. Acceptable forms can be found [online](#). One form of identification is required from List A or, two forms of identification are required (one from List B and one from List C). Please bring original copies.

Dress Code

The standard office attire is **(DEFINE HERE, INCLUDE EXCEPTIONS (e.g, events, board meetings, etc.))**.

Commuting Options

Simmons is easily accessible via public transportation and driving options. The closest T stops include: Museum of Fine Arts (Green Line – E), Fenway (Green Line – D), and/or Ruggles (Orange Line). There are also multiple MBTA bus stops in and around campus. Parking options are available on and near campus. For more information, please visit the Simmons Parking [page](#).

Orientation Agenda

We have a comprehensive schedule prepared for your first few weeks. Attached is your orientation agenda which we will review together on your first day.

EMPLOYEE MILESTONES

Milestone	Objective	Questions to Ask
<p>30 days</p>	<p>Learn</p> <p>Your new hire’s first 30 days should focus on learning the who, what, where, how, and why of their job, the department, and Simmons. By the end of 30 days, your new hire should have a working knowledge of these areas.</p>	<p>What do you like about the job so far? What is going well and what isn’t? What don’t you understand about your job or Simmons? How can we help you succeed? Is the position what you expected? Any surprises since joining us? What areas of training would you like to review?</p>
	<p>Act</p> <p>By the end of 60 days, your new hire should be able to apply what they’ve learned and begin working more independently. You should see relationships building between your new hire and their colleagues. Your new hire should start to think about their own goals and objectives. Discuss the performance review process and set goals.</p>	
<p>60 days</p>	<p>Advance</p> <p>Your new hire is already an “expert” in their position and they should be working independently. They should understand how their role and responsibilities align with the mission and vision of the department and Simmons. They should be contributing to department and Simmons’ initiatives (where applicable).</p>	<p>Do you have too little, enough, or too much work? Do you have the tools/resources you need? How do you see your job connecting to Simmons’ mission/vision? What is going well and what isn’t? What else can we do? How am I doing as a supervisor? What can I do differently? Who have you met thus far?</p> <p>Who has been particularly helpful since you arrived? What are the expectations of your role and how does it fit into the bigger picture? How have your ideas/thoughts been received? What are your goals now that you are three months into the position? How can we improve new hire orientation?</p>

Manager FAQs... Answered	
<p>What if my new hire isn’t meeting these milestones?</p>	<p>There is no need to panic – in fact there may be a simple reason for why your new hire isn’t meeting these milestones. Next step: check in and ask. What is working? How do they learn best? What training has helped and what hasn’t? Review together completed projects, areas of improvement, their job description and your expectations. If these steps do not help, consult with Human Resources to learn other options.</p>
<p>What if my new hire is meeting these milestones quicker than expected?</p>	<p>This is the best “problem” to have! Help your new hire identify ways to take on more responsibility and autonomy. Don’t forget to continue regular check-ins to make sure that they are still on track as they become increasingly independent in their work. Reaffirm what they are doing well and areas of continued improvement.</p>
<p>How do I keep my new hire engaged and motivated?</p>	<p>Understanding their goals and aspirations is critical to keeping your new hire engaged. What do they want to do, how do they want to be challenged, what ideas do they have? You may not be able to accommodate everything, but you can help them take on projects and initiatives that align well with what they want to do. Additionally, share with them your goals and plans for them and their role. Showing them their contribution potential is another great motivational tool.</p>
<p>What happens after 90 days?</p>	<p>Learning doesn’t stop once your new hire reaches 90 days. Continue to have regular check-ins; make sure that you and your new hire have agreed to SMART goals and objectives for the year; review their performance informally and on a regular basis; continue to challenge and involve them in new initiatives. And don’t forget to have fun; coffee or lunch breaks are a great way to continue building your working relationship.</p>

HELPFUL RESOURCE LINKS

Review in person or give your new hire the option to review on their own during their first couple of weeks. This list is not exhaustive of all resources located on our [Internal Website](#).

- [Colleges of the Fenway \(COF\) Website](#)
- [Employee Directory](#)
- [Employee Handbook](#)
- [Faculty Policy Manual](#)
- [Forms and Policy Index](#)
- [Internal Website \(Quick Links at bottom of page\)](#)
- [LinkedIn Learning Resources](#)
- [Office of Organizational, Culture, Inclusion & Equity Resources](#)
- [Organizational Development and Learning Institute \(ODLI\)](#)
- [Public Safety Emergency Management System](#)
- [Technology Quick Start Guide for New Hires](#)
- [Technology How To Guides](#)
- [Service Desk Popular Applications](#)
- [University Communication Tools and Resources](#)
- [Well being at Simmons](#)
- [Working At Simmons](#)
- [Workday@Simmons Website \(Tools and Guides\)](#)
- [Zoom Backgrounds](#)