



Employee Orientation Checklist for Supervisors



Employee Name	
Job Title	
Start Date	

Action Items: Before Employee's First Day

Identify workspace for employee.

Call employee to discuss start date, time, location, work hours, parking, dress code, etc.

Provide employee with a copy of the [Employee Orientation Checklist](#) and [Orientation Guide](#) to complete any pre-boarding activities.

Provide employee with their employee ID, email address (found in [MyHR](#) > *Administrator Home* > *View Employees* after new hire paperwork has been keyed by Central Human Resources), and [WTS](#) phone number to activate their UWO account.

Ensure workspace is prepared, cleaned and stocked with supplies.

Order/setup technology. Complete Form: [New Schulich IT Services Employee Account](#)

Request employee access to required resources and update [Employee Access Tracking](#) form

Request building access:

- Basic & Clinical Departments: Contact [Manager, Administration & Finance](#)
- Dean's Office: Contact [Kevin Inchley](#)

Setup Schulich email. Note: Western email is automatically generated in PeopleSoft.

Setup Telephone (Dean's Office: Contact [Ronnine Elston](#)).

Administrator to add employee to Western Directory (Dean's Office: Contact [Ronnine Elston](#)).

Add employee to email distribution list(s), if applicable.

Add employee to department website, if applicable.

Add orientation meetings, regular meetings, important dates to the employee's work [calendar](#).

Send out [email announcement](#) to leaders and appropriate departments.

Action Items: Employee's First Day/ Week

Give a warm welcome and discuss the plan for the first day/week.

Confirm date/time for Employee Benefits Orientation, if applicable.

Introduce the employee to the team and to his/her buddy, if applicable.

Tour the work area: show where to store lunches, find washrooms, get coffee, fire exits, printer locations, phone list, etc.

Ensure employee completes the [Return to Campus Questionnaire](#), if on-campus.

Review the employee's job description, responsibilities, and expectations for the role.

Ensure technology and systems are setup, connecting employee with [Schulich IS](#) as needed.

[Keys](#) must be requested by the employee. Supervisor will be contacted to approve request.

Explain how to order additional supplies, business cards, etc.

Review absence tracking procedures, including how to submit vacation requests for approval.

Review pertinent [policies and procedures](#) (Western, Schulich, LHSC, etc.)

Discuss building safety-specific and emergency procedures.

Allow time for employee to review [Orientation Guide](#) and [Employee Orientation Checklist](#).

Allow time to complete [required training](#) and ensure employee is aware if there is [additional training](#) required for their role, booking training accordingly.

Invite questions and setup weekly meetings to touch base.

Action Items: 30 Days

Ensure required training has been completed.

Schedule a meeting to discuss:

- How the employee perceives the department and address any concerns
- Was the job what they expected? Why or why not?
- Are there any hindrances to their productivity? If so, what can you do to assist?
- Do they have any suggestions to improve the role or department?
- Discuss their career plans and how you can support their ongoing development

Action Items: Before 90 Days

For UWOSA employees, complete [probationary review](#) before 90 working days has passed.

Action Items: Annually / As Required

For UWOSA employees, after the employee has been in the position for a minimum of 12 months, a copy of the [JES2013 Position Description Questionnaire](#) (PDQ) must be reviewed or completed. At least once every 3 years, as listed on the Review Schedule outlined in Schedule B Article 44.03 of the UWOSA 2017-2021 Collective Agreement, review the existing PDQ.

For PMA employees, complete annual performance dialogue and goal setting ([PDG process](#)).

Action Items: Ongoing

Continue providing regular informal feedback by having frequent discussions about assignments, productivity, and comfort level.

Provide information about continued learning opportunities, [additional training](#), and [support services](#) that are available.

Sample Template: Email Announcement

To [applicable staff and leaders],

I'm very pleased to announce that [new employee name] will join us as [job title] on [start date]. [New employee name] will be responsible for [information about role and pertinent responsibilities].

[Insert information regarding new employee's relevant employment and education.]

You can reach [new employee name] at:

- *[email address]*

Thank you,

[supervisor name]