



Supervisor's Orientation & Onboarding Checklist for New Hires



Employee Name		Western ID	
Supervisor Name		Department	
Job Title		Posn Mgmt #	
Start Date			

Part 1: Up to Six Weeks Before

	Appoint and prepare one or more “buddies” to guide the employee on various tasks and to serve as lunch and break partners for the first week at least, as the employee wishes (<i>best practices: http://newhire.stanford.edu/managers/buddy_assign.html</i>)
	Order new/upgraded computer equipment if possible. For on-campus Schulich staff, contact Schulich IS 2-3 weeks before start date
	Set up telephone service <ul style="list-style-type: none"> • For Basic Departments, contact your directory coordinator • For Dean’s Office, contact Ronnine Elston
	Request access to required resources (see Employee Resources document)
	Draft a training plan for the new employee’s first few months

Part 2: The Week Before

	Ensure work area is prepped, cleaned and stocked with basic office supplies
	Ensure the phone has been set up
	Obtain and provide parking cards, if needed, for the first two days on the job
	<p>Send out announcement containing information about the new hire’s background, anticipated start date, role and how to reach them</p> <p style="text-align: center;"><i>To [staff and leaders of new employee's work area]:</i></p> <p style="text-align: center;"><i>I'm very pleased to announce that [new employee] will join us as [job title] on [start date]. [New employee] will be responsible for [information about what he or she will be doing].</i></p> <p style="text-align: center;"><i>[Name] has recently [information about recent relevant employment background].</i></p>

	<p><i>You can reach [new employee] at:</i></p> <ul style="list-style-type: none"> • <i>[physical location/work address]</i> • <i>[phone #]</i> • <i>[email address]</i> <p><i>Thank you,</i> <i>[Name of supervisor]</i></p>
	Set up a schedule of introductory meetings between the employee and key contacts (clients, partners, resources)
	Prepare interesting tasks for the employee's first day
	Make a copy of the job description, and your department/unit's organization chart
	<p>Request building access once you have obtained the Western ID for the new hire:</p> <ul style="list-style-type: none"> • For Basic Departments, contact your unit's Administrative Officer • For Dean's Office and Clinical Departments, contact Kevin Inchley <p>Keys must be requested by the employee. The supervisor/hiring manager will be contacted to confirm their request.</p>

Part 3: The First Day

	<p>Give a warm welcome and discuss the plan for the day</p> <ul style="list-style-type: none"> • Introduce yourself and tell the employee about yourself and your role • Tour the employee's assigned work space • Explain where to hang coats, store lunches, get coffee, find a washroom, etc.
	Review the overall orientation plan and ask about further needs. Show them both the Western and Schulich Orientation references.
	Review your unit's structure, mission, vision and values, and explain how the employee's role contributes to these and to the goals of the unit. Explain the University's structure. Talk about where your department fits in and how it relates to other departments on campus.
	Review the role description and invite questions
	Specify the outcomes the employee is expected to achieve the first week and the first month; help prioritize initial assignments and tasks.
	Explain the formal and informal performance management and performance development
	<p>Review key behavioural expectations and unit norms:</p> <ul style="list-style-type: none"> • Working hours, and how lunches and breaks are managed

	<ul style="list-style-type: none"> • Telephone, e-mail and internet use, as well as copy and fax use • Protocols for sharing common resources • Covering of absences • How to notify supervisor of planned or emergency absences • Unit social events • Unit health and safety practices • Discuss how vacation requests are handled • Expectations regarding reading School-wide announcements, newsletters & communications • <i>Probationary period (if applicable)</i>
	<p>Review office policies and procedures:</p> <ul style="list-style-type: none"> • After hours and weekend office access • Office organization (files, supplies, etc.) • Office resources (directories, manuals, documentation) • Staff meetings • Accountability • Customer service policy • Confidentiality • Ethics • Finance (accounts, travel, reimbursements) • Available IT support, both Schulich and Western • Review Health & Safety information (http://www.uwo.ca/hr/safety/topics/first_aid.html)
	Introduce the employee to the team, as well as his/her orientation and lunchtime buddies.
	Ensure Western Directory and email distribution Lists have been updated.

Part 4: The First Week

	Review employee work area and ensure equipment meets the needs of the employee
	Introduce employee to key contacts
	<p>Allow time for completion of on-line training modules, which may include but is not limited to:</p> <ul style="list-style-type: none"> • <u>Required training for all roles:</u> <ul style="list-style-type: none"> ○ Accessibility in Service ○ Safe Campus Community—Preventing Harassment, Violence, and Domestic Violence at Western ○ Work Safely at Western—Western’s Employee health and Safety Orientation ○ Basic WHIMIS—Workplace Hazardous Materials Information System • <u>Required training based on work/study area*:</u> <ul style="list-style-type: none"> ○ Supervisory ○ Lab Safety ○ Biosafety ○ Radiation

	<ul style="list-style-type: none"> • Employment Equity Survey <p style="text-align: center;">*Note: Training may be required before an individual can be given access to a lab</p>
	Ensure employee is aware if there is additional training required by their role and book any additional role-specific safety training.

Part 5: After The First Month

	<p>Schedule meetings to discuss:</p> <ul style="list-style-type: none"> • Find out how the employee perceives your department so far. Address any concerns. • Is the job what they expected? Why or why not? • Are there enough opportunities to learn and grow? How can you support their ongoing development? • Are they running into any hindrances to their productivity? What are they and how are they affected by them? • What's the best thing that happened to them? • What suggestions for improvement do they have? • Discuss career development and plans for the future.
	Continue providing regular informal feedback by having frequent discussions about assignments, productivity, and comfort level.
	Provide information about continued learning opportunities, additional training, support services. The Educational Assistance Program site describes financial support programs for continued learning.
	Ensuring training has been completed.

Part 6: Before 90 working days have passed.

	Complete UWOSA probationary review
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Part 7: Annually on Anniversary Date

	Review the role description and invite questions.
	Review Employee Resource Tracking form