Onboarding Checklist – Hiring Managers
Office of Business & Finance

Pre-Arrival:
☐ Schedule time to spend with new hire the day/week of arrival.
☐ Arrange training schedule (who, what, when; customize as necessary or create separate schedule).
☐ Prepare workspace for new hire.
☐ Provide your new hire with start time, where to report on first day, and information to bring.
☐ The HR Service Center will contact 8-Help and provide them with the new hire’s information. A member of the IT staff will follow-up with the hiring manager to ensure access is granted and computer training is provided.

Arrival:
First Day/Week:
☐ Introduce new hire to staff/provide tour of facility.
☐ Discuss mission, vision, and goals of university, VP unit, and department.
☐ Review position description with new hire and discuss role expectations and responsibilities.
☐ Create and post an internal announcement about the new hire.
☐ Select an employee on your team to become a buddy/mentor to the new hire.
☐ Discuss organizational chart and share culture and history of the department.
☐ Discuss vacation/sick days, holidays, hours of work, flexible scheduling, attendance guidelines/ call off procedures, dress code, etc.
☐ Explain office equipment (phones, computer, printer, etc.), office procedures, internet and phone policies.
☐ Provide staff directory, order office keys, building keycards, business cards, etc.
☐ Ensure the new hire has all materials necessary to perform their job and explain how to order supplies.
☐ Schedule meetings with key contacts and units.
☐ Review safety/emergency procedures (Buckeye Alert, BEAP, Tornado/Fire Drill procedures, etc.).
☐ Discuss probationary period (CCS employees only).
☐ Review any other orientation materials (customize as necessary).
☐ Schedule any required trainings – examples:
  o Ethics Training (required – provided quarterly in the Innovation Lab at Stores & Receiving Bldg)
  o Institutional Data Policy Training (online at Carmen.osu.edu)
  o Benefits and Retirement Webinar (BuckeyeyeLearn)
☐ Contact HR Service Center if new hire will need access to HR Action requests or approval access in eTime and eLeave.

Post-Arrival:
First Month:
☐ Meet with new hire to discuss training and answer any questions
☐ Review position description and establish objectives in conjunction with the completion of the Performance Planning and Review document.
☐ Ensure employee has all necessary materials and is becoming familiar with campus.

First Quarter:
☐ Schedule first coaching session and discuss progress on performance goals and role expectations.
☐ Share initial feedback, comments, and concerns and ask for feedback on orientation/on-boarding process/peer-mentor.

First Year:
☐ Evaluate progress on objectives, discuss performance, and develop goals for the following year.