

Employee's Name (please print)

Job Title

Hire Date

NEW EMPLOYEE ONBOARDING CHECKLIST

This checklist assists with the new employee's onboarding process. Onboarding is a long-term process that begins before an employee's start date and continues into the employee's first year of employment. It helps the new hire feel welcome and prepared for their new position. This checklist is organized chronologically and assists with preparing for the new employee's arrival. The department may add activities or processes relevant to the new employee's position.

ACTION		DETAILS
Pre-Arrival – Without Employee ID# (EMPLID)		
Call to Welcome New Hire		Call to officially welcome the new employee to NDSU after confirmation of acceptance. <ul style="list-style-type: none">• Provide information to a contact person in the event the new employee has a question or issue (onboarding peer is recommended)• Let the new employee know where to park and report to on the first day, dress code, and workday hours
Send Announcement		Send an announcement to the department announcing the new hire and their start date.
Benefits Session		All newly hired employees receive an email invitation to attend the next available new employee benefits meeting/NEO.
Form I-9 Completion		Ensure completion of the Form I-9 : <u>On-campus or Fargo area employees:</u> <ul style="list-style-type: none">• Section 1: To be completed by the employee no later than the 1st day of employment• Section 2: Document verification must be completed no later than the 3rd day of employment by NDSU HR <u>Off-campus and out-of-Fargo-area employees:</u> <ul style="list-style-type: none">• Section 1: To be completed by the employee no later than the 1st day of employment• Section 2: May be completed remotely via Zoom with NDSU HR *Section 2: Document verification must be completed no later than the 3 rd day of employment by Authorized Personnel or Notary Public
Zoom Phone Process		Ask your department telephone administrator to submit a requisition to have a Zoom Account generated for your new hire. Telephone – Administrator Resources and Admin List
Computer Ordering & Set-up Information (for new or existing machines)		<ul style="list-style-type: none">• Confirm preferred computer hardware configurations here• Purchase the selected computer from the Bookstore or call 231-7761 for assistance• Contact your department's Software Contact to have the PC/laptop imaged or re-imaged. View instructions here
Order Name/Door Plate		Departmental decision
NDSU Name Badges		For guidelines, questions, or if you need information regarding appropriate format, or recommended vendor: <ul style="list-style-type: none">• Contact: Amy Ochoa in University Relations at 701.231.1068 or amy.ochoa@ndsu.edu
Work Space		Organize workspace and order supplies
Update Website Info		It is the department's responsibility to update its department page.
Authorize Parking		Notify the parking office a new employee is authorized to park in a designated lot. Please include the name and lot designation. Please notify the parking office 24 hrs. before employee start date. Email: ndsu.parking@ndsu.edu Permits can be purchased on the NDSU Parking website , and a temporary permit can be printed at the end of the transaction.
Prepare a List of Contacts		Prepare a list of contact information (names of staff, job titles, job duties, contact information) and other contacts across campus. <ul style="list-style-type: none">• NDSU Contact List

ACTION		DETAILS
	Prepare Welcome Packet/Welcome Email	Have information available to go through and discuss with the new employee on their first day. Some suggestions: <ul style="list-style-type: none"> • Campus Map • University and Department Organizational Charts • Campus Contact Lists • Leave Slip/Time Sheet (if applicable) • Floor plans of Memorial Union (Conference Rooms) • Holidays and Break Times (if applicable)
	Schedule New Employee (Staff)/ Faculty Orientation Session	For Staff: This is the half-day monthly orientation with Human Resources and President Cook. HR will send invites to new staff when the monthly sessions are scheduled. For Faculty: This is a two-day yearly orientation in the fall with Faculty Affairs .
	Misc.: Reimburse Moving Expenses	Check with your Vice President and/or Dean to see if applicable Please refer to NDSU Policy Section 171: Staff and Faculty Recruitment and Moving Expenses
Pre-Arrival – After you receive the Employee ID# (EMPLID)		
Access and Authorizations: (IT Services, Building Access, Miscellaneous)		
	Automated IT Services (enroll)	Once you have the employee's electronic ID # , provide it to the employee. If they have a computer at home, direct them to New Employee Account Setup for instructions on activating IT services. Within 24-48 hrs. of "enrolling" the employee will automatically receive access to: <ul style="list-style-type: none"> • E-mail address • Wireless access • Desktop Auth (cluster and computer lab login) • Library services
	Departmental IT Services	Specific departmental IT services must be requested by the employee's supervisor. Send a request to ndsuhelpdesk@ndsuh.edu or visit the IT Help Desk . Such service requests include, but are not limited to: <ul style="list-style-type: none"> • Department shared drives (S: drive) • Content Management System (Typo3 – website creation/editing) • Perceptive Content access/permissions
	Request Building Access – Keys or Card Access	Contact your department's Key Control Person
	Order Business Cards	Order online from Print and Copy Services . You must have an employee ID and email address before ordering business cards.
Miscellaneous Services: (add departmental specific items)		
	Dept LISTSERV	Ensure the employee is added to the appropriate department LISTSERV(S).
First Day		
	Greet New Employee	Show the new employee their workspace
	Introductions	Introduce the new employee to co-workers, other employees in the building, and others. Suggestion: have a welcome coffee break or lunch with your department.
	Department Tour	Provide a department tour, including critical areas such as time clock (if applicable), mailboxes, break area, restrooms, office supplies, copiers, fax machines, printers, etc.
	Campus Tour	Provide a tour and map of the campus. Some suggestions to include in the tour: <ul style="list-style-type: none"> • Dining Services • Departments the new employee will work with closely • Wellness Center • Memorial Union (Conference Rooms) • Library • Facilities Management (parking, motor pool)
	Obtain Parking Permit	Assist employee with obtaining their parking permit. <ul style="list-style-type: none"> • Parking and Transportation Services

	ACTION	DETAILS
	NDSU ID (employee badge)	Assist employee with obtaining their NDSU ID card. <ul style="list-style-type: none"> • NDSU Card Center, located in QBB 206.
	Meeting with Employee (Staff)	Meet with the employee to discuss University and department protocol/information: <ul style="list-style-type: none"> • Information in Welcome Packet/Email • Dress code • How to fill out time sheets, use KABA or other (if applicable) • Department hours and employee's work hours, lunch/break times Policy 137: Holidays, Policy 213: Rest Periods, Policy 214: WorkWeek • Payroll schedule and overtime policy (if applicable) Policy 129: Salary Administration, Policy 212: Overtime • Annual/sick leave policies and processes for requesting time off or reporting absences Leave Policies to reference: 130, 135, 139, 143, 146, 147, 149 • Review department norms including customer service standards, expected response time for emails and phone calls, phone etiquette, culture, department mission, etc. • Review the department communication process, staff meetings, emails, etc. • Training (phone use, copy machine codes, programs, professional development) • Educational Opportunities – Tuition Waivers Policy 133: Educational Policy, Policy 133.1: Tuition Waiver - Spouse/Partner and Dependents • Policy 158.1: Email as an Official Communication Method for Employees
	Meeting with Employee (Faculty)	Meet with the employee to discuss University and department protocol/information: <ul style="list-style-type: none"> • Review Faculty Affairs page • Review Faculty Resources
Access and Authorization to Systems:		
	PeopleSoft Access – Finance	Prerequisite: PeopleSoft Data Privacy Training <ul style="list-style-type: none"> • How to Access the NDUS Data Privacy Training Training is required before using the Accounts Payable Entry role. Once access is given, an email will be sent to the new employee to schedule training with the Financial System Trainer. <ul style="list-style-type: none"> • Karen Blake, Financial Systems Trainer 701-231-7433 or karen.j.blake@ndsu.edu Getting Finance Access
	PeopleSoft Access – HCM	Prerequisite: PeopleSoft Data Privacy Training <ul style="list-style-type: none"> • How to Access the NDUS Data Privacy Training The supervisor sends an email to ndsu.hr@ndsu.edu which includes: <ul style="list-style-type: none"> • Roles the new user will need • Departments they need to access • Name (First, Middle Initial, Last) • Employee ID • Phone Number • Email Address
	PeopleSoft Access – Student	Prerequisite: PeopleSoft Data Privacy Training <ul style="list-style-type: none"> • How to Access the NDUS Data Privacy Training
	Request Online Access to HCM - Recruiting Solutions	Recruiting Solutions within HCM is the online hiring system. If your new employee needs access, send an email to ndsu.hr@ndsu.edu . Include the employee's name, level of access to be assigned, and department number(s) the user will need access to.
	Employee Self-Service	Allows an employee to: view pay advice, benefits, personal information, leave accrual, etc. <ul style="list-style-type: none"> • Employee receives email from the PeopleSoft Help Desk with instructions on how to claim the user ID and password (occurs after they have been hired into HCM) • Contact the PeopleSoft Help Desk for login issues at 866-457-6387 • Self-Service Guide

ACTION		DETAILS
Within the First Week		
	Review the Position Description (PD). Submit signed PD to Human Resources.	Staff: Review Position Description/Duties/Responsibilities and have the employee sign the Position Description (PD) and submit it to Human Resources. Policy 101: Personnel Definitions , Policy 101.1: Employee Group Definitions , Policy 241: Broadbanding Policy Faculty: submit to your Dean's office for inclusion in an official personnel file
	Review Performance Development process	Meet with Employee to discuss Performance Expectations <ul style="list-style-type: none"> Explain the 6-month probationary period and extension option Policy 222: Broadbanded Staff Probationary Period *The supervisor will receive probationary instructions from HR at the 6-month date. Review the Annual Performance Review Process Policy 221: Broadbanded Staff Responsibility Review Review the missions of the University and department and how the missions relate to their position Review departmental operations
	Emergency procedures	Explain the emergency broadcast system, how it works, and what to do. Discuss other emergency preparedness procedures for your department.
	Purchasing Card (if applicable)	The P-Card does not apply to all positions. <ul style="list-style-type: none"> NDSU Purchasing Card User Manual
Training and NDSU Policy Information:		
Vector Solutions: Mandatory and Specialty Training, NDSU Policies		
	Mandatory Annual Trainings	We use Vector Solutions for employee training. Vector was implemented for NDSU employees, not NDSU students. The only students who will have access to Vector are student employees or non-employee/contingent students who have been added via the Grouper list process. <ul style="list-style-type: none"> NDSU Training New employees will be automatically assigned the required trainings in Vector. Some required trainings will be in-person/Zoom and new employees will need to register for them. *Please contact Kristina Astrup at 701-231-8965 or kristina.astrup@ndsu.edu if you would like specific trainings assigned to your new employee(s). New employees are also able to self-enroll in Extra Training courses in Vector.
	Training for Specialty Areas	Your new employees may have required department and/or specialty area trainings. <ul style="list-style-type: none"> Specialty Areas Training
	Review NDSU Policies	Remind your new employee to review the NDSU Policy Manual .
Other:		
	Research and Creative Activity (RCA) – if applicable	The NDSU Office of Research and Creative Activity (RCA) provides a wide spectrum of services to researchers at all stages of their careers. <ul style="list-style-type: none"> Research and Creative Activity
On an Ongoing Basis		
	Be Available for Questions	Meet regularly to answer questions, and schedule one-on-one meetings.
	Job-Related Behaviors	Document and address specific job-related behaviors, both positive and negative. Immediately provide feedback on areas for improvement as problems occur. Openly praise positive behavior and good performance. Please remember - annual reviews should never be a surprise. Have one-on-ones with your employees to ensure they know where they stand with their performance.
	Job-Related Staff Issues	Conditions of Employment Policies: <ul style="list-style-type: none"> Policy 220: Staff Job Discipline/Dismissal Employee Rights Policies: <ul style="list-style-type: none"> Policy 230: Grievance Procedure for Conditions of Employment Policy 231: Appeal Procedure for Disciplinary and Reduction in Force Actions

A copy of this form may be provided to the new employee for their reference.