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REV. JUNE 2017

Modeled after “New Employee Onboarding – Supervisor’s Resource” - University of Wisconsin-Madison Office of Human Resource Development  
http://www.ohr.wisc.edu/.

UHRS • Phone: (765) 285-1834 • Fax (765) 285-8663
The Importance of Onboarding
Onboarding helps to cultivate long-term relationships, promote a better understanding of the Ball State culture, and foster a feeling of belonging and purpose. When done properly, it also increases new employee motivation, performance, and retention. As an example of the importance of onboarding, before Ball State conducted the presidential search in 2016-17, the university leadership and the Board of Trustees committed to providing the new president, Geoffrey S. Mearns, with onboarding tools designed to help accelerate the onboarding process.

Overview
Onboarding is a continuing process that begins before a new (or transitioning) employee’s start date and lasts through the first six (6) to twelve (12) months of employment.

The New Employee Onboarding Supervisor’s Guide is designed to help supervisors save time, stay organized, and prepared during the onboarding process. As such there are two checklists which complement the Guide, one is for supervisors and one is for the new employee.

Onboarding Goals
• To get the new employee the tools and resources to be successful.
• To help the new employee understand and navigate the university culture.
• To help cultivate a long-term relationship
• To minimize the time between a new employee’s first day and the day they become productive members of their workgroup by arranging appropriate training and network.

UHRS HR-TMS Onboard
Before new employees join the Ball State University community onsite, University Human Resource Services (UHRS) will send an informational e-mail and will initiate the onboarding process through Onboard. Supervisors may e-mail UHRS at humanresources@bsu.edu or contact by phone at 285-1834 if there are any questions.

The new employee will receive many useful items electronically through Onboard. See list of Onboard items on page 12.

Using This Onboarding Guide
The New Employee Onboarding Supervisor’s Guide will walk you through your new employee’s first year of employment. It provides guidelines on how and when to complete certain actions that will help the new employee succeed.

The onboarding process is broken into several stages starting with “Before Day One” (Stage 1) and ending with “First Year” (Stage 7). Within each stage of onboarding, you, the supervisor, have actions you are encouraged to complete including check-in sessions.

A check-in session is designed to check the progress in areas other than visible performance. It’s to get a feel for relationships with colleagues, frustrations or concerns with the job, successes and struggles, and whether the employee has acclimated to the culture.

The more you do up front to prepare, the more successful you and your new employee will be. There is a pattern within each onboarding stage which includes the collaboration of efforts between the supervisor and onboarding coordinator. See “Key Roles Responsibilities” on page 2.

The onboarding coordinator role is not a new job/position. It involves activities performed as determined by the supervisor whenever there is a new employee in the department or office.

Important Note: Every employee and situation is different. The information and timeline covered are important, but flexibility and customization is encouraged.
**Support:** Your role in this process is critical to the success of your new employee. However, you are not alone. Resources are available to you by e-mailing UHRS at humanresources@bsu.edu or by calling 285-1834.

**Key Roles Responsibilities**

**Supervisor**
- Fully participates in onboarding new employees as outlined in the department/unit program.
- Selects the onboarding coordinator and onboarding partner.
- Determines the onboarding coordinator’s and partner’s assignments.
- Encourages the onboarding coordinator’s and partner’s timely feedback.
- Welcomes new employee.
- Communicates job expectations.
- Ensures tasks are coordinate within the onboarding process.
- Delegates meaningful work assignments.
- Determines training/development plan.
- Communicates department vision/mission/culture.
- Be available for frequent check-ins.
- Ensures timely performance feedback.

**Onboarding Coordinator**
- Oversees the onboarding process within the department.
- Coordinates the onboarding process with the new employee’s supervisor.
- Primary contact for the program. Accountable for review, enhancement, and maintenance of program.
- Ensures immediate administrative needs of the new employee are met.
- Coordinates meetings and schedules as needed.
- Serves as the point person for the new employee.
- Tracks progress of the onboarding process.
- Ensures the new employee has an opportunity to provide feedback on the onboarding experience.
- Consults with UHRS as needed.

**Onboarding Partner - The “Go-to-person”**
- The onboarding partner is the point of reference who offers support and guidance for the new team member.
- May be a co-worker with significant university experience to provide accurate, positive, and meaningful information.
- Plays an active role in orienting the new employee to the department and university.
- Welcomes new employee and make introductions.
- Helps the new employee understand and navigate the university’s work environment, culture, etc.
- Checks in frequently with new employee.
- Serves as a resource or connect the new employee with resources to answer specific questions.
Things to Remember Before Day One: Ensure everything is in place to welcome the new employee.

Stage 1 Before Day One

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities/Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>UHRS</td>
<td>• Onboard will generate an email containing the instructions and link to access Onboard.</td>
</tr>
<tr>
<td></td>
<td>• Brainstorm ideas on how to welcome new employees within the department to personalize the onboarding experience.</td>
</tr>
<tr>
<td></td>
<td>o Buy a small BSU branded gift.</td>
</tr>
<tr>
<td></td>
<td>o Welcome card signed by co-workers.</td>
</tr>
<tr>
<td></td>
<td>o Add a welcome sign at the door with the person’s name.</td>
</tr>
<tr>
<td></td>
<td>o Welcome snack celebration (fruit, cookies, etc.), to greet the person.</td>
</tr>
<tr>
<td></td>
<td>• Send out notification to the hiring manager or supervisor after the candidate is selected and/or offer letter is sent.</td>
</tr>
<tr>
<td></td>
<td>o <strong>New positions:</strong> Notifications include the supervisor’s name, new employee’s name, position title, start date, and department.</td>
</tr>
<tr>
<td></td>
<td>o <strong>Internal transfers:</strong> Notifications include the supervisor’s name, employee’s name, position title, start date, and department.</td>
</tr>
<tr>
<td>Supervisor</td>
<td>See the <em>Onboard Supervisor Checklist</em> on page 8-10.</td>
</tr>
<tr>
<td></td>
<td>• Optional: Consider making lunch plans for day one at your discretion (possibly inviting the team to join). (“No host.”)</td>
</tr>
<tr>
<td></td>
<td>Collaborate activities with onboarding coordinator for assistance.</td>
</tr>
<tr>
<td>Onboarding Coordinator</td>
<td>In collaboration with the supervisor:</td>
</tr>
<tr>
<td></td>
<td>• Prepare necessary onboarding materials.</td>
</tr>
<tr>
<td>Onboarding Partner</td>
<td>• Be prepared to assist in making the entry into the college, department, or unit as smooth and seamless as possible.</td>
</tr>
</tbody>
</table>

Things to Remember on the First Day: This is the new employee’s first real impression of Ball State University, their team, and the working culture.

Stage 2 The First Day

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities/Activities/Questions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supervisor</td>
<td>See the <em>Onboard Supervisor Checklist</em> on page 8-10.</td>
</tr>
<tr>
<td></td>
<td>Collaborate activities with the onboarding coordinator for assistance.</td>
</tr>
<tr>
<td>Onboarding Coordinator</td>
<td>In collaboration with the supervisor:</td>
</tr>
<tr>
<td></td>
<td>• Schedule one-on-one meeting with new employee and supervisor, if applicable.</td>
</tr>
<tr>
<td></td>
<td>• Answer any immediate questions/concerns, including who to call for particular questions.</td>
</tr>
<tr>
<td></td>
<td>• Communicate basic information about the workplace.</td>
</tr>
</tbody>
</table>
Ball State University
New Employee Onboarding Supervisor’s Guide

- Ensure employee reads and signs the [IT Security Employee Confidentiality Agreement](#) (also titled “Model Confidentiality and Information Access Agreement”). This agreement is available and may be completed online via HR-TMS Onboard.
- Instruct the new employee to obtain a BSU photo ID from Bracken Library, Room 311. If the new employee has questions, they may contact the ID card office at 765-285-CARD (2273), visit [bsu.edu/idcards](http://bsu.edu/idcards), or e-mail [idcards@bsu.edu](mailto:idcards@bsu.edu).
- Provide the new employee with card and/or key for building access (if applicable).
- Introduce the new employee to BSU online tools (e-mail, resources, etc.).

**Onboarding Partner**

- Optional: Consider having lunch (no obligation to pay) or organizing a pitch-in to welcome the new employee.

**Things to Remember the First Week:** “New employees lack knowledge about the culture and politics of the organization, the challenges they will face, and what they will need to do to be successful.”

Get the new employee up to speed. Focus should include culture, values, team priorities, and strategy.

### Stage 3 The First Week

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities/Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Supervisor</strong></td>
<td>See the Onboard Supervisor Checklist on page 8-10.</td>
</tr>
<tr>
<td></td>
<td>- Ensure a job training plan is in place for the new employee.</td>
</tr>
<tr>
<td></td>
<td>- Introduce new employee to <a href="http://mybsu">MyBSU</a> and Self-Serve Banner.</td>
</tr>
<tr>
<td></td>
<td>- Ensure new employee has access to departmental systems, e.g. SciQuest, INB, Argos, BannerWorks, HR-TMS (PeopleAdmin), etc., if applicable</td>
</tr>
</tbody>
</table>

Collaborate activities with the onboarding coordinator for assistance.

<table>
<thead>
<tr>
<th>Role</th>
<th>In collaboration with the supervisor:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Onboarding Coordinator</strong></td>
<td>- Ensure the new employee is introduced to key contacts within the, college, division, department or unit, and functional areas.</td>
</tr>
<tr>
<td></td>
<td>- Demonstrate the applicable college’s, department’s, or unit’s online tools and processes. Examples: Self-Service Banner (SSB) (including Accessibility), Kronos Timekeeper, MYBSU, SciQuest, Travel &amp; Expense Management, etc.</td>
</tr>
<tr>
<td></td>
<td>- Explain how to report problems with BSU username and password through the <a href="http://technologyhelpdesk">Technology Helpdesk</a> and/or UHRS.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Role</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Onboarding Partner</strong></td>
<td>- Introduce to peers in the department, college, or unit and other key areas.</td>
</tr>
<tr>
<td></td>
<td>- Provide employee with a tour of campus.</td>
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<tr>
<td></td>
<td>- Make an effort to meet as often as possible for the first week.</td>
</tr>
<tr>
<td></td>
<td><strong>Optional:</strong> Consider having lunch (no obligation to pay) with the new employee.</td>
</tr>
</tbody>
</table>

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**Thinks to Remember the First Month:** It is important for the new employee to have a good grasp of job responsibilities and their general function within the team after 30 days. The new employee should become comfortable utilizing systems to maximize their efficiency.

**Stage 4 The First Month**

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities/Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supervisor</td>
<td>See the Onboard Supervisor Checklist on page 8-10.</td>
</tr>
<tr>
<td></td>
<td>• Collaborate activities with the onboarding coordinator for assistance.</td>
</tr>
<tr>
<td>Onboarding Coordinator</td>
<td>• Check in with new employee regularly and answer any questions they may have or direct them</td>
</tr>
<tr>
<td></td>
<td>to someone who has the information.</td>
</tr>
<tr>
<td>Onboarding Partner</td>
<td>• Familiarize the new employee with the university’s systems and processes.</td>
</tr>
<tr>
<td></td>
<td>• Provide a point of reference, support, and guidance for the new employee.</td>
</tr>
<tr>
<td></td>
<td>• Assist the new employee in understanding and navigating the university’s work environment.</td>
</tr>
</tbody>
</table>

**Things to Remember the First Three Months:** The New Employee should feel assimilated and self-sufficient. Their work and goals align with the college, department, or unit, and their team.

**Stage 5 The First Three Months Progress Review**

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities/Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supervisor</td>
<td>• Schedule a meeting with new employee. Use the New Employee 3-Month Progress Review form</td>
</tr>
<tr>
<td></td>
<td>to help guide the conversation. Provide feedback.</td>
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<tr>
<td></td>
<td>• Perform the 90-day probationary review for staff and service personnel per UHRS.</td>
</tr>
<tr>
<td></td>
<td>• Confirm that the new employee is engaged with their work and team. Make any necessary</td>
</tr>
<tr>
<td></td>
<td>adjustments to focus on maximizing the new employee’s satisfaction and contribution.</td>
</tr>
<tr>
<td></td>
<td>• Set training expectations, if needed.</td>
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<tr>
<td></td>
<td>• Ensure the new employee, peer, and customer meetings are on schedule and progressing</td>
</tr>
<tr>
<td></td>
<td>well.</td>
</tr>
<tr>
<td></td>
<td>• Work to ensure your new employee is becoming self-sufficient, understands the role and</td>
</tr>
<tr>
<td></td>
<td>expectations, and is executing their objectives.</td>
</tr>
<tr>
<td></td>
<td>• Collaborate activities with the onboarding coordinator for assistance.</td>
</tr>
<tr>
<td>Onboarding Coordinator</td>
<td>• Check in with the new employee periodically. Ensure working knowledge of online tools,</td>
</tr>
<tr>
<td></td>
<td>processes and systems.</td>
</tr>
<tr>
<td></td>
<td>• Ensure the new employee is utilizing onboarding partner and other resources.</td>
</tr>
<tr>
<td></td>
<td>• Discuss the Learning and Development sessions opportunities.</td>
</tr>
<tr>
<td>Onboarding Partner</td>
<td>• Encourage networking and answer questions where possible.</td>
</tr>
</tbody>
</table>
**Things to Remember the First Six Months and Beyond:** Continue to promote collaboration and teamwork.

**Stage 6 The First Six Months (180-day check-in)**

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities/Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Supervisor</td>
<td>• The new employee should understand their roles and expectations. Are they executing objectives? Work to ensure your new employee is becoming self-sufficient.</td>
</tr>
</tbody>
</table>
|                             | • Schedule a check-in session with the new employee. Topics for conversation may include:  
  o Does the new employee understand their role?  
  o Is the job what they expected?  
  o What ideas does the new employee have for improvements within the department or larger community?  
  o Does the new employee feel comfortable with colleagues? Do they feel they are fitting in?  
  o Are there issues with colleagues that need to be addressed?  
  o Does the new employee have feedback about your relationship with them?  
  o What feedback can the new employee provide regarding the onboarding process?  
  o Send selected questions to new employee prior to your meeting with them, such as an agenda/guide for the discussion.  
  o Recognize the onboarding partner for their role in the program at your discretion, and make a note in their performance evaluation.  
  o Collaborate activities with the onboarding coordinator for assistance. |
| Onboarding Coordinator      | • Check in with the new employee regularly and answer any questions they may have or direct them to the key person who has the information. |
| Onboarding Partner          | • Continue to focus on network building with the new employee.  
  • Formally wrap up onboarding partner program; encourage mentor/peer relationship. |

**The Next Six Months:**
Over the next six months until the end of the first year of employment, the supervisor and onboarding coordinator collaborate efforts to ensure that the new employee continues to get support.
Things to Remember at the Year: Celebrate New Employee Anniversary!
Evaluate and review the onboarding process. The onboarding coordinator formally concludes the onboarding process and obtains final feedback from the new employee.

Stage 7 The First Year (*One-year anniversary check-in)

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities/Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Supervisor</strong></td>
<td>• Schedule a check-in session with the new employee to wrap up the onboarding process which includes an evaluation and review of the year-long onboarding process.</td>
</tr>
<tr>
<td></td>
<td>• <strong>Topics for conversation may include:</strong></td>
</tr>
<tr>
<td></td>
<td>o Does the new employee understand their role?</td>
</tr>
<tr>
<td></td>
<td>o Is the job what they expected?</td>
</tr>
<tr>
<td></td>
<td>o What ideas does the new employee have for improvements within the department or larger community?</td>
</tr>
<tr>
<td></td>
<td>o Does the new employee feel comfortable with colleagues?</td>
</tr>
<tr>
<td></td>
<td>o Does the new employee feel they are fitting in?</td>
</tr>
<tr>
<td></td>
<td>▪ If not, are there issues with colleagues that need to be addressed?</td>
</tr>
<tr>
<td></td>
<td>o Does the new employee have feedback about your relationship with them?</td>
</tr>
<tr>
<td></td>
<td>o What feedback can the new employee provide regarding the onboarding process?</td>
</tr>
</tbody>
</table>

*NOTE: Formal UHRS performance evaluations are done annually in March/April. This may not coincide with the new employee’s one-year anniversary.

<table>
<thead>
<tr>
<th>Role</th>
<th>Responsibilities/Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Onboarding Coordinator</strong></td>
<td>• Celebrate! Send congratulations message to new employee.</td>
</tr>
</tbody>
</table>

BSU Onboarding Program Review

UHRS will periodically evaluate the onboarding process to assess its effectiveness and efficiency. The program review will identify components that are positively received and shouldn’t be changed along with areas that might need modification. In addition, UHRS will track new employee retention rates (1-18 months).

Data Sources:
• Employee Onboard surveys at 21 days, six months, and one year.
• Supervisor surveys/reviews at six months and one year.
• Banner data.

Please contact UHRS at 285-1834 for more information.
New Employee Onboarding Supervisor Checklist

Employee’s Name: ___________________________ Department: ___________________________ Start Date: __/__/ 

Checklist is for personal reference only. Activities are to be completed within the first 30-60 days from the new employee’s start date. Internal hires need to only complete relevant activates specific to the department.

Before Day One

☐ Business Cards (Order at least 1-2 weeks before start).
☐ Select onboarding coordinator & partner.
☐ Collaborate with onboarding coordinator & partner.
☐ Create first-week schedule for the new employee.
☐ Confirm arrival date on campus and provide Relocation information, if applicable.
☐ Send welcoming message to new employee before first day.
☐ Discuss dress code.
☐ Discuss office hours.
☐ Confirm status of the new employee BSU username and email account setup.
☐ Begin to schedule key meetings and training for new employee.
☐ Confirm security access/forms, if applicable.
☐ Workstation setup (Computer, phone, office/desk nameplate, supplies, files, lockers, etc.).
☐ Ensure office keys are available, if applicable.
☐ Order/create name tag, if applicable.
☐ Follow-up with new employee (email, call).
☐ Discuss with new employee that they have paid for Parking.
☐ Confirm with UHRS new hire’s orientation date, time, & location.
☐ Notify colleagues with new employee’s start date and ask them to add the new hire to their email distribution list.

The First Day

☐ Welcome the new employee.
☐ Give new employee name tag, if applicable.
☐ Conduct face-to-face introductions of new employee with colleagues. Show location of colleagues’ offices, break area, supply cabinet, bathrooms, etc.
☐ Confirm I-9 has been completed at Human Resources in AD 350 on first day of employment.
☐ Confirm employee has signed and dated the IT Model Confidentiality and Information Access Agreement.
☐ Ensure new employee signs department compliance forms.
☐ Discuss the job specifics if the position is considered essential personnel.
☐ Discuss employee’s reporting of work/vacation/sick hours/Kronos.
☐ Discuss probationary period, if applicable.
☐ Discuss overtime/comp time policy, if applicable.
☐ Discuss sick leave policy.
☐ Discuss vacation policy/how to request.
☐ Discuss work place do’s & don’ts.
☐ Provide conflict of interest information, if applicable.
☐ Discuss emergency building plans.
☐ Sign for keys, if applicable, to new employee.
☐ Issue personal safety/protective equipment, if applicable.
☐ Discuss job description & expectations.
☐ Discuss individual goals/work plan.
Confirm new employee has reviewed the employee handbook. Service employees receive their handbook in orientation. All other handbooks are available online.

Identify customers & frequent contacts. Provide face-to-face or email introductions.
Provide list of key phone numbers, client phone list & inform on how to use the BSU online directory.
Optional: Consider taking the new employee to lunch.

**The First Week**
- Ensure new employee attends new employee orientation.
- Review calendar of major upcoming events and deadlines.
- Set 30-day priorities or on-the-job training.
- If the new hire has direct reports, schedule relevant meetings.
- Establish preferred method of communication: Stop by office, schedule a meeting, email, and/or phone.
- Introduce new employee to [MyBSU](https://mybsu.bsu.edu) and [Self-Serve Banner](https://selfserve.bsu.edu).
- Ensure new hire has access to departmental systems, e.g. SciQuest, INB, Argos, BannerWorks, [HR-TMS](https://hr-bucks.bsu.edu) ([PeopleAdmin](https://peopleadmin.bsu.edu)), etc., if applicable.
- Set up duo (two-factor) authentication, if applicable.
- Review department customer service expectations.
- Review university and departmental policies.

**The First Month**
- Ensure employee is engaged with his/her work and team; and make any necessary adjustments to focus on maximizing employee satisfaction and contribution.
- Discuss how you want your new employee to prepare for your one-on-ones with you.
- Ensure there are no overlaps with onboarding partner of responsibilities or redundancy in your focus areas.
- Ensure the new employee has all necessary materials and is becoming familiar with the job, team and campus.
- Confirm that new employee has looked through the [BSU Employee Guide](https://hr.bsu.edu). 
- Provide list of acronyms and abbreviations, if applicable.
- Discuss department goals, mission, & values, if applicable.
- Discuss university goals, mission, & values, if applicable.
- Review department and university policies, if applicable.
- Discuss timing and process of performance evaluation.
- Discuss relevant timelines (projects, learning curve), if applicable.
- Provide department/division organizational chart.
- Discuss department, division, and/or university’s strategic plan.
- Discuss shadowing co-worker, if applicable.
- Review and clarify performance objectives and expectations after the first month.
- Be available to the new employee, as needed, both for impromptu or scheduled meetings.
- Meet at least once a week for the first 90 days. Spend quality, productive time with your new employee early on.

**Training**

**BSU Community (Additional resources are available in the BSU Employee Handbook)**
- Athletics Events
- BSU Calendar of Events
- Campus Dining
- Campus Landmarks & Traditions
- [Employee Quick Clinic](https://hr.bsu.edu) - Health Center
LA Pittinger Student Center
Pruis/Emens, Planetarium, Museum, etc.
Recreation Center Services
Theatre and Dance Productions
Working Well – Wellness

Muncie Community (Additional resources are available in the BSU Employee Handbook)
Muncie Indiana Transit System (MITS) city buses
The Village

OnBoarding Follow Up—Watch for e-mails with surveys at these intervals:
21 days review.
6 Month Review – Send agenda to employee before scheduled meeting, if applicable.
1 Year One-on-One Progress Review – Send Congratulations e-mail/note. (This is not the same as the annual HR performance evaluation)

Other—specific to the department or job:

_____________________________________________________

_________________________________________________

_________________________________________________
New Employee Onboarding Employee Checklist

Employee’s Name: ________________________ Department: ________________________ Start Date: __/__/___

Checklist is for personal reference only. Activities are to be completed within the first 30-60 days from the new employee’s start date. Internal hires need to only complete relevant activates specific to the department.

Before Day One

☐ Obtain BSU ID - Please contact the ID card office at 765-285-CARD (2273), visit bsu.edu/idcards, or email idcards@bsu.edu.
☐ Purchase parking permit.
☐ Complete I-9 online & bring supporting documents to University Human Resource Services, Administration Building, Room 350 on or before your first day of employment.
☐ Check on your e-mail account & set up your password.
☐ Confirm arrival date on campus with supervisor and view Relocation information, if applicable.
☐ Follow-up with supervisor by email or phone as needed.
☐ Familiarize yourself with the BSU website and take a moment to take the virtual tour.

The First Day – Discussion with your supervisor

☐ Receive name tag, if applicable.
☐ Meet your colleagues/participate in department orientation or job specific tour (break area, supply cabinet, bathrooms, etc.).
☐ Meet your Onboarding coordinator and partner.
☐ Sign department compliance forms.
☐ Discuss the job specifics if you are an essential personnel.
☐ Discuss office hours.
☐ Discuss how to report work/vacation/sick hours on Kronos.
☐ Discuss probationary period, if applicable.
☐ Ask follow-up questions about dress code.
☐ Discuss overtime/comp time policy, if applicable.
☐ Discuss sick leave policy.
☐ Discuss vacation policy/how to request.
☐ Discuss work place do’s & don’ts.
☐ Discuss any conflict of interest, if applicable.
☐ Discuss emergency building plans.
☐ Sign for keys, if applicable, to new employee.
☐ Receive personal safety/protective equipment, if applicable.
☐ Discuss job description & expectations.
☐ Discuss individual goals/work plan.
☐ Review employee handbook. Service employees receive their handbook in orientation. All other handbooks are available online.
☐ Did you receive a list of customers & frequent contacts?
☐ Did you receive a list of key phone numbers, client phone list & inform on how to use the BSU online directory?
The First Week
- Attend new employee orientation.
- Review calendar of major upcoming events and deadlines.
- Discuss 30-day priorities or on-the-job training.
- Discuss relevant meetings with your direct reports, if any.
- Discuss preferred method of communication: Stop by office, schedule a meeting, e-mail, and/or phone.
- Familiarize yourself with the university’s online MyBSU and Self-Serve Banner.
- Receive access to departmental systems, e.g. SciQuest, INB, Argos, BannerWorks, HR-TMS (PeopleAdmin), etc., if applicable.
- Set up duo (two-factor) authentication, if applicable.
- Review department customer service expectations.
- Review university and departmental policies.

The First Month
- Review BSU Employee Guide available online.
- Did you receive a list of relative acronyms and abbreviations? (if applicable)
- Discuss department goals, mission, & values, if applicable.
- Discuss university goals, mission, & values, if applicable.
- Review department and university policies, if applicable.
- Discuss timing and process of performance evaluation.
- Discuss relevant timelines (projects, learning curve), if applicable.
- Review department/division organizational chart.
- Discuss department/division, and/or university’s strategic plan.
- Discuss shadowing co-worker, if applicable.
- Ensure you have enrolled in benefits (some are legally limited to enrollment in first 30 days of employment.).

Training
- Discuss Learning & Development sessions available.

BSU Community (Additional resources are available in the BSU Employee Handbook)
- Athletics Events
- BSU Calendar of Events
- Campus Dining
- Campus Landmarks & Traditions
- Employee Quick Clinic - Health Center
- LA Pittinger Student Center
- Pruis/Emens, Planetarium, Museum, etc.
- Recreation Center Services
- Theatre and Dance Productions
- Working Well – Wellness

Muncie Community (Additional resources are available in the BSU Employee Handbook)
- Muncie Indiana Transit System (MITS) city buses
- The Village
OnBoarding Follow Up— Watch for e-mails with surveys at these intervals:

☐ 21 days review.
☐ 6 Month Review – Send agenda to employee before scheduled meeting, if applicable.
☐ 1 Year One-on-One Progress Review – Send Congratulations e-mail/note. (This is not the same as the annual HR performance evaluation)

Other—specific to the department or job:

☐ __________________________________________________________

☐ __________________________________________________________

☐ __________________________________________________________
List of Onboard Documents

Before new employees join the Ball State University community onsite, UHRS will send the official offer letter and initiate the onboarding process through Onboard. The following documents will be electronically sent to the new employee through Onboard.

1. Welcome to BSU - Informational
2. New Employee Orientation Agenda - Informational
3. I-9 Instructions - Action Required
4. I-9 - Action Required
5. I-9 Supporting Documents - Action Required
6. Indiana State Tax Form - Action Required
7. W-4 - Action Required
8. Direct Deposit - Action Required
9. 2017 Benefits Rates - Informational
10. PERF at a glance - Informational
11. PERF Membership Record - Action Required
13. Retirement Savings - Informational
14. Universal Availability Notice - Action Required
15. Confidentiality & Information Access - Action Required
16. IT Employee Confidentiality Agreement - Action Required
17. Acknowledgement of Employee Handbook Access - Action Required
18. Drug-Free Campus Brochure - Informational
19. Universal Precautions - Informational
20. HR Contact Info - Informational
21. BSU Map App - Informational
22. Virtual Tour - Action Required
23. BSU Employee Photo ID - Action Required
24. Purchase Parking Permit - Action Required
25. Emergency Alerts - Action Required
26. Visit University Human Resource Services - Action Required
New Employee Onboarding 3-Month Progress Review

Employee & Supervisor complete prior to scheduled 3-month check-in session then discuss responses.

Date: ______________________________

Employee Name: ______________________________ Title: ______________________________

Department: _______________________________________________________________________________

Supervisor Name: ______________________________ Title: ______________________________

Check appropriate answers below.

1. Do you understand the requirements of your job?  Yes □  Partly □  No □

2. Do you feel your training has been adequate to successfully complete your job?  Yes □  Partly □  No □

3. Do you have regular opportunities to discuss your work and objectives with your supervisor?  Yes □  Partly □  No □

4. Would you like to have more informal meetings with your supervisor than you are currently having?  Yes □  Partly □  No □

Please answer the following on a scale of 1 to 5 (5 is strongly agree, 1 is strongly disagree)

5. Does your position satisfy your personal/professional goals?  □ 1 □ 2 □ 3 □ 4 □ 5 □

6. Satisfaction level of your employment at Ball State University.  □ 1 □ 2 □ 3 □ 4 □ 5 □

Do you have any skills, aptitudes, or knowledge not fully utilized in your job? If so, what are they and how could they be used?  __________________________________________________________

___________________________________________________________________________________________

Is there any additional help, training, or coaching you would like from your supervisor?

___________________________________________________________________________________________

___________________________________________________________________________________________

Other comments?  __________________________________________________________

___________________________________________________________________________________________

___________________________________________________________________________________________

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Tips on Creating an Employee Development Plan

Investing in the progress and growth of the new employee aids in the success of the department. An employee development plan should be a collaborative effort between you and the employee. It can include a variety of activities such as:

- Informal on-the-job training
- Formal classroom and/or online training
- Conferences and special events
- Self-study activities.

Regardless of the formality of the plan, you should work with your new employee to create the plan by:

- Breaking down the job by the knowledge, skills, and abilities required.
- Determining the new employee’s current competency level in each area.
- If a gap in skill(s) exists, discuss potential training and learning opportunities to strengthen those areas.
- Prioritize the needs and create a plan.