

Getting a new employee off to a good start makes a difference in their job effectiveness and overall feeling of welcome. It is beneficial to orient your new hires as well as continue to fully engage them throughout their employment at Southern Oregon University. This checklist serves as a guideline and best practice for supervisors and managers. Please complete the checklist below at pre-arrival, first day, first week, first month, three month and six-month intervals (non-applicable activities may be recorded as N/A).

Employee Name:			
Start Date:			
Job Title:			
Department:			
Position Category:	<input type="radio"/> Classified	<input type="radio"/> Unclassified	<input type="radio"/> Faculty

Pre-Arrival Checklist	
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<input type="checkbox"/>	Confirm start date with new hire; inform where to park, what time and where to go on first day, and describe expected dress code.
<input type="checkbox"/>	Submit IT Account Request Form on behalf of new employee and submit the corresponding task in Workday
<input type="checkbox"/>	Remind of the need to timely complete digital onboarding tasks in Workday (including the I-9 form with HR).
<input type="checkbox"/>	Remind to purchase parking permit through the parking portal (need OKTA access to be able to create account/login)
<input type="checkbox"/>	Contact building manager to update the workspace listed on employee's Workday account
<input type="checkbox"/>	Prepare workstation/office set up (e.g. telephone, computer, office supplies, name tag, keys, etc.).
<input type="checkbox"/>	Introduce in a department meeting or department/campus e-mail of the new hire's start date and role.
<input type="checkbox"/>	Schedule on the calendar a time for you and the new hire to meet on their first day. Delegate this if you will be out of the office (e.g. vacation or business conference).
<input type="checkbox"/>	Prepare a training schedule for the first few days and include calendared appointments with key members from the department or within the university.
<input type="checkbox"/>	Other:

First Day Checklist	
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<input type="checkbox"/>	Plan an official welcome and discuss the agenda for the first few day and what to expect for the first week.
<input type="checkbox"/>	Explain structure of work area including SOU and the department's organizational chart.
<input type="checkbox"/>	Explain departmental policies and work rules to new employee.
<input type="checkbox"/>	Provide new hire with tour of the department facilities (e.g. emergency exits, first-aid kit, kitchen, water station, restrooms, eateries, etc.).
<input type="checkbox"/>	Add new employee to department website, departmental telephone list, and e-mail distribution lists.
<input type="checkbox"/>	Show and explain all regularly used applications (e.g. Zoom phone, fax system, OKTA, Workday, Google Suite, Office 365, Box, etc.)
<input type="checkbox"/>	Have employee review CISR guides as well as the HR Guides to help navigate Workday (e.g. recording timesheet, requesting sick/vacation time, etc.)
<input type="checkbox"/>	Have employee complete annual IT cybersecurity training in KnowBe4 app (can be accessed in OKTA)
<input type="checkbox"/>	Have employee review campus resources (CPS Preparedness , Standard Response Protocols , SOU CARES , etc.)
<input type="checkbox"/>	If possible assign employee to shadow another position for a while to assist with the transition into role and department.
<input type="checkbox"/>	Provide "A day in the life..." realistic preview of a typical day for the employee's position.
<input type="checkbox"/>	Other:

First Week Checklist	
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<input type="checkbox"/>	Explain SOU's strategic plan and department's mission and how the employee's role fits.
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<input type="checkbox"/>	Explain the six-month Initial Trial Service period and how you plan to confirm satisfactory performance.
<input type="checkbox"/>	Introduce work for the employee to accomplish as a first assignment. Provide guidance and coach if necessary.
<input type="checkbox"/>	Arrange meeting for new hire to meet with Dean, Director, VP, etc. as appropriate.
<input type="checkbox"/>	Explain roles of key service personnel (e.g. Service Center, Travel, Payroll, Business Services, Athletics, etc.).
<input type="checkbox"/>	Explain use of student employees (if applicable) and clarify filing systems and arrange to have training on pertinent software systems (e.g. Excel, Adobe, Banner, Cognos, Workday, DocuSign, etc.)
<input type="checkbox"/>	Provide a tour of the campus.
<input type="checkbox"/>	(if benefits eligible) Ensure employee attends the virtual benefits orientation with benefits officer, Nicole Blodgett (employee will be emailed invite link, usually held on Wednesdays from 1:00-3:00 PM)
<input type="checkbox"/>	Other:
First Month Checklist	
<input type="checkbox"/>	Continue to clarify roles, responsibilities, and expectations as needed and provide ongoing coaching and feedback.
<input type="checkbox"/>	Schedule regular weekly/monthly meetings for one-on-one feedback and to answer questions.
<input type="checkbox"/>	Ensure that essential training has been completed or is scheduled to be completed and discuss any necessary professional development opportunities.
<input type="checkbox"/>	Have employee complete training modules in SafeColleges (automated email with login will be sent, contact hrs@sou.edu if experiencing issue)
<input type="checkbox"/>	(if benefits eligible) Ensure employee makes their health benefits and retirement elections and submit corresponding tasks in Workday.
<input type="checkbox"/>	Other:
Three Month Checklist	
<input type="checkbox"/>	Continue to clarify roles, responsibilities, and expectations as needed and provide ongoing coaching and feedback. If the administrative/classified employee is not meeting performance expectations despite training and feedback, contact hrs@sou.edu
<input type="checkbox"/>	Other:
Six Month Checklist	
<input type="checkbox"/>	Administrative/Classified employee's Initial Trial Service period is complete. Recommend supervisor completes a performance evaluation.
<input type="checkbox"/>	Update or set additional goals in anticipation for the annual performance evaluation.
<input type="checkbox"/>	Other:
One Year Checklist	
<input type="checkbox"/>	Complete annual performance review.
<input type="checkbox"/>	Other: