

**Supervisor Checklist for *Virtual* Onboarding**

**System Office Employees**

***A Plan For A Successful First Year***

**Phase One: Before Employee’s First Day**

**Phase Two: First Day/Week**

**Phase Three: First 30 Days**

**Phase Four: First 30-90 Days**

**Phase Five: Support Through the First Year**

**Employee Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Unit:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Start Date:**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Office Location:**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Supervisor:**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| --- |
| **BEFORE EMPLOYEE’S FIRST DAY (PHASE ONE)** |
| **Timeframe for Completion: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |
| **TASK** | **ASSIGNEE** |
| **Communicate with your new employee** |   |
| □    Send a personal welcome letter/note/email.  | \_\_\_\_\_\_\_\_ |
| □    Connect with the new hire regarding the first day logistics (via zoom). Discuss the following: □ Work schedule □ If employee has WIFI connection and appropriate work space, do they need supplies? | \_\_\_\_\_\_\_\_ |
|  □    Communicate itinerary for first day  □ (UIUC and UIS) Is employee comfortable with an in person first day contact? If so, inform them where to park, meeting time and place, and proper protocol for COVID-19, etc.). Must have a mask. If no, arrangements will need to be made to have a laptop delivered/picked up by employee with no in person contact. | \_\_\_\_\_\_\_\_ |
| **Contact Desktop Support (ACCC or Tech Services) for equipment if new equipment is required and IT support:*** New equipment is taking approximately 6 weeks and Brian Metzger will be the contact for equipment during remote work in Urbana.
* For Chicago, contact Barry Goldstein or Anthony Marino. Please note, ACCC employees are prohibited from coming to campus until further notice. If using existing equipment, ACCC can provide remote support, but options will need to be discussed about equipment handoff. Please contact ACCC desktop support for a remote support engagement session.
* Discuss how new equipment will be received (if dropped off at office or picked up, etc.). Please see below that has more details regarding equipment.

**General Remote Working Reminders:** * Have discussions about remote expectations such as work schedule, hours, lunch time, flexibility, video etiquette, etc**. This is not a business as usual work arrangement.**
* Recognize that the training period may be longer than normal.
* Schedule daily check-ins suggested for at least the first two weeks.
* Provide list of websites to learn about University and/or department including [SHRS resources for working remotely](https://www.hr.uillinois.edu/employeedevelopment/resources_remote_working) and Faculty Staff Assistance.
* Understand that communication will be challenging and you cannot over communicate during this time.
* Provide unit resources, such as the staff directory, office manual, process flow charts, etc.
* Understand that starting a new job is *difficult* and working remotely will make this more challenging.
 | \_\_\_\_\_\_\_\_ |
| **Anticipate and Prepare for the new employee’s arrival** |   |
| □    Once background check has cleared (will be notified by SHRS) notify other staff in the unit that a new employee will be starting and provide start date and any pertinent information | \_\_\_\_\_\_\_\_ |
| □    Create an itinerary for the first week and communicate this with the new hire so they know what to expect when they arrive (Appendix A - Sample). | \_\_\_\_\_\_\_\_ |
| □    Assign a “friend/buddy” (a unit staff member the new employee could seek guidance from). Ensure employee has a backup in absence of supervisor availability. | \_\_\_\_\_\_\_\_ |
| □    FYI: Employee will establish new employee logon through UI New Hire System HR as well as a netid (UIN is auto generated). SHRS will notify unit of netid and UIN and will process the new hire transaction.  | \_\_\_\_\_\_\_\_ |
| □    In order for VPN access to be enabled for remote work during COVID-19, the telecommuting agreement must be completed electronically at: <https://appserv7.admin.uillinois.edu/FormBuilderSurvey/Survey/shrs/telecommuting/telecommuting_agreement/> □ Once the telecommuting agreement is approved, VPN access will be enabled by AITS Security. □ If employee is not coming to campus, 2FA, and enrollment for that can be done from off- campus, using this process: <https://answers.uillinois.edu/systemoffices/internal/page.php?id=86292>. Otherwise this will be done when employee meets with IT on site.  □ Arrange for phone and/or Skype setup (once UIN and start date established) (UIC Telecommunications; Springfield Skype for Business; Urbana Skype for Business; Chicago employees may need ability to make outside calls from SKYPE. | \_\_\_\_\_\_\_\_ |
| □    Set up email, group mailboxes, email distribution lists, calendars, and calendar permissions (once UIN and start date established) (Chicago Email and Calendaring; UIS email; UIS Tech Service; Urbana Email, Calendar, and Conferencing) | \_\_\_\_\_\_\_\_ |
| □    Determine types of software access is needed | \_\_\_\_\_\_\_\_ |
| □    Arrange for your department IT professional to meet with the new hire on the first day to ensure email accounts and any necessary software are up and running if employee is comfortable with in person contact– **COVID 19 restrictions apply.****□  Coordinate with building/facilities contact to ensure limited persons in building** **□ Ensure equipment has been sanitized****□ If employee is not comfortable with in person contact the unit can allow employee to use personal laptop, mail a laptop, deliver laptop or arrange for a no contact pick up. If using personal laptop, contact desktop support for further instructions.**  | \_\_\_\_\_\_\_\_ |
| □    Start Net Access form with basic employee information (OBFS Units Only) | \_\_\_\_\_\_\_\_ |
| [□   Confirm employee has completed E911 Acknowledgment (NetID required) (E911 General Information and Links to Forms)](https://answers.uillinois.edu/illinois/page.php?id=47509) | \_\_\_\_\_\_\_\_ |
| □    When returning to work, arrange the workspace and ensure employee has supplies:  | \_\_\_\_\_\_\_\_ |
| □    Order business cards and/or nameplate and/or business cards (UIC Creative and Digital Services; Springfield Creative Services; Urbana Business Cards and Stationary)  | \_\_\_\_\_\_\_\_ |
| □    Provide necessary office supplies if requested (pens, paper, etc.) | \_\_\_\_\_\_\_\_ |
| □    Ensure work area is clean and sanitized | \_\_\_\_\_\_\_\_ |
| □    Ensure furniture and equipment is in good repair (chairs, keyboard, etc.) | \_\_\_\_\_\_\_\_ |
| □    Request keys and/or building access if needed. If keys are available it’s helpful to have another employee go with the new hire once staff is back on campus (Chicago Building Access; Chicago Keys; Urbana Locks and Keys; Springfield Key Request/ Card Reader Access) | \_\_\_\_\_\_\_\_ |
| □    Ensure new employee gets registered for Virtual System Office New Employee Orientation (System Human Resource Services will schedule the employee for New Employee Orientation, but the manager needs to ensure they attend – **attendance required).** | \_\_\_\_\_\_\_\_ |
| □    Contact unit director to update the org chart | \_\_\_\_\_\_\_\_ |
| □   Add employee to unit directory and website. (SHRS will update for UIC employees) | \_\_\_\_\_\_\_\_ |
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| **EMPLOYEE’S FIRST DAY/WEEK (PHASE TWO)** |
| **Timeframe for Completion: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |
| **TASK** | **ASSIGNEE** |
| **Welcome**  |   |
| □  If in person first day contact is scheduled:□ Greet employee at the front door as they will not have i-card access, and show employee to their office space□ Follow all social distancing guidelines, including wearing a mask when meeting in person. Manager shouldwear a mask, make sure new employee has a mask or ensure you provide them with one□ Provide hand sanitizer/be mindful of hand washing and distance as much as possible□ Do not have hand to hand contact□ Gloves should be worn by IT if handling laptop and strongly encouraged for manager and employee | \_\_\_\_\_\_\_\_\_\_ |
| □    Go over agenda for the day so they know what to expect | \_\_\_\_\_\_\_\_\_\_ |
| □    Tour office building and workplace – may need to be done again, when back in the office permanently | \_\_\_\_\_\_\_\_\_\_ |
| □    Zoom meet and greet! Meet co-workers (official or unofficial welcome) | \_\_\_\_\_\_\_\_\_\_ |
| □    Location of break room, conference rooms, kitchen, restrooms, mail box, printer/copier, etc. can be done on first day if in person contact is relevant. If not, this will need to be done when employee is back on campus | \_\_\_\_\_\_\_\_\_\_ |
| □    Ensure employee and supervisor signatures are included on the Job Description. This is sent with the offer letter and only needs to be done if not done previously.  | \_\_\_\_\_\_\_\_\_\_ |
| □    Explain to whom the employee may go to with questions/concerns to when supervisor is not present | \_\_\_\_\_\_\_\_\_\_ |
| □    Share employee’s work contact information – phone, email, employee ID number | \_\_\_\_\_\_\_\_ |
| □    Discuss office hours and dress code | \_\_\_\_\_\_\_\_\_\_ |
| □    Discuss office protocols (go through handbook if applicable)□ Set up weekly or even daily meetings with employee to touch base.  | \_\_\_\_\_\_\_\_ |
|  |   |
| **Additional Tasks**  |   |
| □    I-Card and Parking -**– No in person parking or I-card visits during COVID- 19**. However, employee may contact parking to get on waitlist for parking. Add calendar reminder to take employee to get I-Card once the campus is open (I-Card; UIC Parking; UIS Parking; UIUC Parking).  | \_\_\_\_\_\_\_\_ |
| □    Employee should register for Virtual Benefits Orientation – New Hire Benefit Sessions:(Chicago Course Registration, Springfield Course Registration, Urbana Course Registration.□    Ensure employee is aware of where the State Benefits enrollment site can be found at:[HTTPS://MYBENEFITS.ILLINOIS.GOV](https://MYBENEFITS.ILLINOIS.GOV).  | \_\_\_\_\_\_\_\_ |
| □    Determine any other needed training (for example – OBFS, Banner, etc.) (HR System Training and Documentation, OBFS Curriculum Guide) | \_\_\_\_\_\_\_\_ |
| □    Review unit security procedures | \_\_\_\_\_\_\_\_ |
| □    Generate card swipe and review procedures (if applicable) | \_\_\_\_\_\_\_\_ |
| □    Order T-Card and P-Card (if applicable) (T-Card; P-Card) | \_\_\_\_\_\_\_\_ |
|  |   |
| **Information Technology** |   |
| □    Discuss with employee IT related issues and arrangements. If necessary, arrange for IT professional to assist:(Chicago ACCC; Springfield IT Service; Urbana IT Services) | \_\_\_\_\_\_\_\_ |
| □    Computer – appropriate use and security  | \_\_\_\_\_\_\_\_ |
| □    Computer/internet use policies | \_\_\_\_\_\_\_\_ |
| □    Email lists – add new employee | \_\_\_\_\_\_\_\_ |
| □    Office printer/copier  | \_\_\_\_\_\_\_\_ |
| □   Access to shared drives□  Provide employee with zoom.illinois.edu link for university related meetings | \_\_\_\_\_\_\_\_ |
| □    Review appropriate use of Security of Confidential and Sensitive Information statement (if applicable) –sent with offer letter | \_\_\_\_\_\_\_\_ |
| □    Arrange for Outlook calendar to be shared (if applicable) | \_\_\_\_\_\_\_\_ |
| □    Ensure printing capabilities | \_\_\_\_\_\_\_\_ |
| [□    Request access as applicable for the following (Unit Security Contacts):](https://www.aits.uillinois.edu/access/find_my_usc) | \_\_\_\_\_\_\_\_ |
| □    Banner | \_\_\_\_\_\_\_\_ |
| □    Blackboard | \_\_\_\_\_\_\_\_ |
| □    Supervisor to go over the following topics  | \_\_\_\_\_\_\_\_ |
| □   Scheduled meetings and events – add new employee to ongoing or upcoming meetings/events  | \_\_\_\_\_\_\_\_ |
| □   E-mail policies – use, etiquette, expectations, out of office notifications | \_\_\_\_\_\_\_\_ |
| [□  Review time entry requirements and process (e.g. Web Time Entry, AVSL (not active for approximately one month, email upon activation will be sent to the employee and manager), Positive Time Reporting (if not active after two weeks, contact SHRS) (Time Entry Links)](https://www.hr.uillinois.edu/system_office_employees/hr_systems) | \_\_\_\_\_\_\_\_ |
| □   Accept meeting requests for any relevant meetings to attend | \_\_\_\_\_\_\_\_ |
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| **FIRST 30 DAYS (PHASE THREE)** |
| **Timeframe for Completion: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |
| **TASK** | **ASSIGNEE** |
| **Learning the Role** |   |
| □    Discussion items: | \_\_\_\_\_\_\_\_ |
| □    Review job description | \_\_\_\_\_\_\_\_ |
| □    Review expectations of position/job responsibilities (beginning of the performance management process) | \_\_\_\_\_\_\_\_ |
| □    Department norms/expectations | \_\_\_\_\_\_\_\_ |
| □    Preferences for communication with supervisor and colleagues – phone, email, one-on-one meetings | \_\_\_\_\_\_\_\_ |
| □    Written/unwritten rules – (e.g., what does “on time” to a meeting look like, checking work email or working from home) | \_\_\_\_\_\_\_\_ |
| □    Provide unit org chart | \_\_\_\_\_\_\_\_ |
| [□  Discuss the formal performance appraisal process (System Office Performance Management)](https://www.hr.uillinois.edu/system_office_employees/training_and_development_programs) | \_\_\_\_\_\_\_\_ |
| □    Role of position in relation to other co-workers/team | \_\_\_\_\_\_\_\_ |
| □    Role of position in relation to other units within department | \_\_\_\_\_\_\_\_ |
| □    Introduce to co-workers in other units, this can also be done via zoom during this time | \_\_\_\_\_\_\_\_ |
| □    Consider having a team lunch  | \_\_\_\_\_\_\_\_ |
| □    If employee has not already attended the virtual System HR New Employee Orientation (offered once per month in Urbana and once per month in Chicago) – registered by System HR – be sure they are enrolled. | \_\_\_\_\_\_\_\_ |
| [□   Schedule other training: Banner, T-Card, P-Card, etc. (OBFS Curriculum Guide)](https://www.obfs.uillinois.edu/training/curriculum-guide/) | \_\_\_\_\_\_\_\_ |
| [□   Provide System org chart (Administrative Org. Charts)](http://www.pb.uillinois.edu/what-we-do/institutional-research-and-analytical-studies/administration/administrative-org-charts.cfm) | \_\_\_\_\_\_\_\_ |
| □    Civil Service: explain probationary form (either 6 months or 12 months depending on classification)  | \_\_\_\_\_\_\_\_ |
| □    Explain acceptable and unacceptable performance behaviors and expectations | \_\_\_\_\_\_\_\_ |
| □    Review and schedule time for required trainings  | \_\_\_\_\_\_\_\_ |
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| **FIRST 30 – 90 DAYS (PHASE FOUR)** |
| **Timeframe for Completion: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** |
| **TASK** | **ASSIGNEE** |
| **About Your Organization and Unit** |   |
|   |   |
| □    Review the following items with the employee: | \_\_\_\_\_\_\_\_ |
| □    Job description (this will be a repeat but may be beneficial) | \_\_\_\_\_\_\_\_ |
| □    A brief history of the department | \_\_\_\_\_\_\_\_ |
| □    Department mission, vision, strategies, core values, goals | \_\_\_\_\_\_\_\_ |
| □    Departmental website, employee newsletter, other | \_\_\_\_\_\_\_\_ |
| □    Departmental growth-past and future  | \_\_\_\_\_\_\_\_ |
| □    Industry awards and recognitions, areas where we excel in our industry | \_\_\_\_\_\_\_\_ |
| □    Acronyms & symbols related to department | \_\_\_\_\_\_\_\_ |
| □    Conduct tours of office, laboratories, plants, facilities, remote office locations | \_\_\_\_\_\_\_\_ |
| □    Plan team-building and icebreaker exercises | \_\_\_\_\_\_\_\_ |
|   |   |
| **Departmental Commitment to Service** |   |
| □    Review the following items with the employee: | \_\_\_\_\_\_\_\_ |
| □    Department’s primary constituents (students, parents, faculty, staff, vendors) | \_\_\_\_\_\_\_\_ |
| □    Departmental partners—on and off campus  | \_\_\_\_\_\_\_\_ |
| □    Services provided by the department | \_\_\_\_\_\_\_\_ |
| □    The importance of being a good service representative for the department | \_\_\_\_\_\_\_\_ |
|  |  |
| **SUPPORT THROUGH THE FIRST YEAR (PHASE FIVE)** |
| **TASK** | **ASSIGNEE** |
| **Helping Your New Employee Achieve Success In Their Role** |   |
| One-on-one meetings, communication, consistent feedback and constant engagement will help the new hire reach higher levels of productivity faster and will help your new employee become a fully integrated member of your organization.  |   |
| □    Meet with employee at the end of each of the first several days to see how the day went | \_\_\_\_\_\_\_\_ |
| □    Schedule supervisor/employee check-ins after 30, 60, 90 days, and regular one-on-one meetings (bi-weekly is recommended, but this will depend on the position) | \_\_\_\_\_\_\_\_ |
| □    Ensure probationary form (for Civil Service employees) is completed on time (either 6 months or 12 months depending on classification). | \_\_\_\_\_\_\_\_ |
| □    Provide on-going feedback, personally engage with your new hire and recognize their contributions | \_\_\_\_\_\_\_\_ |
| □    ***Around 90 days from the hire date, ask your new hire how their role aligns with what was described during the initial interview process.***  | \_\_\_\_\_\_\_\_ |
| □    Ask the new hire to share their own feedback on improvements and share who has been helpful during their transitional process. | \_\_\_\_\_\_\_\_ |
| □    At one year, it is an excellent opportunity to thank, motivate, and congratulate the employee. | \_\_\_\_\_\_\_\_ |

## *Each unit may customize this document to add additional resources specific to your organization/unit. This might include links to org charts, a list of acronyms specific to your unit, or links to specific policies or training material.*

**APPENDIX A – SAMPLE ITINERARY**

**New Employee Name**

**New Employee’s Title**

***First Week Itinerary***

|  |
| --- |
| **Monday, Date** |
| **Time** | **Item** | **Location** |
| 8:30 AM | Meet with [Trainer, Supervisor or Office Manager]* Tour of office
* Set up desk and computer
* Go through Office Handbook
 | Office # XXX |
| 9:30 AM | Meet with Director | Office # XXX |
| 10:15 AM | Meet with Co-Worker #1 | Office # XXX |
| 11:00 AM | Meet with Co-Worker #2 | Office # XXX |
| 11:45 AM | Lunch with New Employee’s Supervisor | TBD |
| 1:00 PM | Training Time | Employee’s Desk |
| 3:00 PM | Meet with Co-Worker #3 | Office # XXX |
| 3:30 PM | Meet with Co-Worker #4 | Office # XXX |
| 4:00 PM | Meet Co-Worker #5 | Office # XXX |
|  |
| **Tuesday, Date** |
| **Time** | **Item** | **Location** |
| 8:30 AM | Meet with New Employee’s Supervisor | Office # XXX |
| 9:00 AM | Meet with Department Head | Office # XXX |
| 10:00 AM | Quarterly Business Meeting | Conf Room # XXX  |
| 12:00 PM | Office Lunch | TBD |
| 1:00 PM | Meet with Co-Worker #6 | Office # XXX |
| 1:30 PM | Meet with Co-Worker #7 | Office # XXX |
| 2:00 PM | Meet with Co-Worker #8 | Office # XXX |
| 2:30 PM | Meet with Co-Worker #9 | Conf Room # XXX |
| 3:00 PM | Training and Desk Time | Employee’s Desk |
|  |
| **Wednesday, Date** |
| **Time** | **Item** | **Location** |
| 8:30 AM | Desk Time | Employee’s Desk |
| 9:00 AM | Meet with Co-Worker #10 | Office # XXX |
| 9:30 AM | Meet with Co-Worker #11 | Conf Room # XXX |
| 10:00 AM | Meet with Co-Worker #12 | Office # XXX |
| 10:30 AM | Training Time | Employee’s Desk |
| 12:00 PM | Lunch with Trainer | TBD |
| 1:00 PM | Tour of Henry Administration Building | HAB |
| 2:00 PM | Training and Desk Time | Employee’s Desk |
|  |  |  |
| **Thursday, Date** |
| **Time** | **Item** | **Location** |
| 8:30 AM | Desk Time | Employee’s Desk |
| 9:00 AM | Meet with Co-Worker #13 | Office # XXX |
| 9:30 AM | Meet with Co-Worker #14 | Office # XXX |
| 10:00 AM | Training Time | Employee’s Desk |
| 12:00 PM | Lunch with Assistant Vice President’s Team | TBD |
| 1:30 PM – 5 PM | Training and Desk Time | Employee’s Desk |
|  |  |  |
| **Friday, Date** |
| **Time** | **Item** | **Location** |
| 8:30 AM – 5 PM | Desk Time & Training | Employee’s Desk |
|  |  |  |
| **Other Scheduled Events** |
| WednesdayDate8:30am – 3pm | New Employee Orientation | Conf Room # XXX |