Onboarding Checklist

The transition of an individual into an effective and engaged TCCS staff member is a journey that continues after they are hired. Focus on helping your new employee feel welcome, informed, and prepared to assume their new position and to contribute as soon as possible. Aim to sustain the excitement they felt when they accepted your offer to work at TCCS. Below is a list of tasks that can be part of this process to help take out the guesswork (required tasks are marked with *):

Two Weeks Prior

☐ Send a welcome email to convey your excitement for their arrival. Remind them to bring their documents for their orientation with Human Resources on their first day.

☐ *Submit a New Hire Request Form to the IT Helpdesk to set up their network account.

☐ Submit a Telephone Work Order Request for phone/voicemail setup and equipment (e.g., headset, new phone, etc.) as needed.

☐ Order business cards as needed.

☐ Workstation Setup: Order or coordinate items for their workstation to make sure it’s ready for them to start working (e.g., desk supplies, computer components, etc.).

   ☐ Submit a Facilities Work Order as needed to prepare the workstation.

☐ Mobile Phone: If applicable, discuss the mobile phone reimbursement policy.

☐ Training: Arrange position-specific training and/or development opportunities as applicable.

Prior to Start Date

☐ Plan: Create an onboarding plan for training, important meetings, and handing off tasks and work projects. Consider inviting the new hire to a team lunch or scheduling a “coffee break” to introduce them to the team within their first week.

   - Proactively welcome your new hire and share information they need to arrive prepared for their first day at the expected time and location. Human Resources will provide you with a template itinerary for the new hire’s first couple of days.

☐ Send a personalized email and/or initiate an informal phone call to keep the new hire engaged. Address questions and provide information on next steps.

☐ Stakeholders: Create a prioritized stakeholder list with whom the new hire should connect. You can either:

   - Provide the list to new hire and instruct them to schedule meetings,
Schedule meetings prior to their start date and notify them upon their arrival.

☐ Announcement: Create an announcement for your team and other stakeholders. Distribute it by the new hire’s first week of employment. Outline the new hire’s achievements, experience and educational background (as applicable), and their new role at TCCS.

☐ First Meeting: Prepare for and schedule a first meeting with the new hire on their first day. Review the resources listed below and as applicable gather materials to provide. Ensure the new hire is informed about:

- Their job description and your expectations. Ask how they prefer to be recognized.
- How communication will work between the two of you and with the rest of the team. Ask how they prefer to receive communications (e.g., assignments, information, requests, etc.).
- Business work hours for your team/unit, and procedures for calling out.
- Dress and grooming standards.
- Timekeeping - provide instructions and expectations regarding the following:
  - Biweekly: entering worked time, requesting time off, and submitting their timecard.
  - Monthly: requesting and adding time off to their timecard.
- Explain the business unit’s purpose & structure and relation to other units.

☐ Technology: Coordinate with the IT team (ITHelp.Desk@claremont.edu) to provide any software, security, access to shared drives, etc. the new hire needs for their position.

Start Date

Create an engaging experience that reassures your new employee they have made the right choice in coming to work with you. Lay the groundwork for high employee engagement by helping them navigate their first weeks of new peers and processes. In addition to having them complete required tasks to be onboarded, be sure they spend some time on their first day performing/completing actual work.

☐ Greet your new hire (or ensure someone is assigned to greet them) and help them settle in.

☐ Explain or provide the following to new hire the following as applicable:
  - Basic office/workstation supplies and how to acquire additional items as needed
  - Keys to desk or cabinets
  - Business unit number
  - Campus interactive map and other map resources
  - Office Support directory in Clare
  - Event Management System (EMS)
  - TCCS brand standards for communications (e.g., email signature)
  - Expense reporting
  - Training and professional development opportunities and/or plan
  - Procedures for calling out and requesting time off
  - How to use the phone system, what is their phone extension, setting up their voicemail & password, and how to send telephone requests to IT
  - Emergency phone numbers for Campus Safety: (909) 607-2000 or x72000
• TCCS organizational charts, and where they and their team fall
• If they will travel for business, provide them the TCCS travel policy
• If applicable, ensure they have and know how to use personal protective equipment (PPE), such as safety goggles, mask, guards, etc.

☐ Show them their workspace and equipment. Allow time for them to get acclimated to the work area and computer systems.

First Week

☐ Provide a campus tour, including addressing any security needs.
☐ Schedule a recurring one-on-one meeting
☐ Host a team meeting or lunch and conduct introductions.
☐ Share and discuss their onboarding plan. Allow flexibility for their input.
☐ *Review unit and position requirements, expectations, and goals of their job. Provide documentation they need to review (e.g., policies, job description, reference materials)
☐ Arrange one-on-one meetings with appropriate peers, leaders, HR business partner, etc.
☐ Guide them to use TCCS intranet (Clare) and employment portal (Workday).
☐ *Discuss professional etiquette and guidelines for working collaboratively with other staff and groups within and outside TCCS.
☐ Arrange job-related training or development activities as appropriate.

First 30 Days

Provide your new employee an overview of their position and the roles of team members before getting into the details of their day-to-day activities to help them understand TCCS strategies, goals, and values. Help them understand how their role fits into the overall mission of TCCS. Plan opportunities where they can experience the variety of TCCS’s functions, businesses, products, and strategies to encourage an engaged employee who will stay long term and understand the “why” not just the “how”.

☐ *Revisit their job description and ensure they understand their responsibilities, level of authority and decision-making, and priorities.
☐ Review business strategies and culture in detail as appropriate for their position: who’s who, goals for TCCS and the business unit, how decisions are made, how information is shared, where and how requests are directed, etc.
☐ Provide an overview of the business unit and TCCS organization charts (available on their Workday profile under “Team”).
☐ Provide reference materials, business unit policies, and administrative processes.
☐ Follow-up to confirm all training has been completed.

☐ *Introduce TCCS’s goal setting and performance review process. Inform them when their first formal review will be conducted.

- Plan work assignments and projects. Make time to discuss them on multiple occasions to assist the new employee in taking over.
- Review communication methods that work best for the team, projects, and your manager-employee relationship
- Support their productive work relationships and make recommendations for people with whom they can connect.
- Follow up after they have meetings with key stakeholders and debrief.

Ongoing

As you build on the new employee’s knowledge and experience, they should become comfortable with the team, the responsibilities of their job, and your expectations. Assisting your new employee in learning these elements in a formal way ensures that everything will be covered appropriately and with care for their long-term success.

☐ Revisit the onboarding plan with your new employee and debrief about requirements, expectations, accomplishments, and gaps.

☐ Review key business priorities for the next year.

☐ *Conduct a formal performance meeting as per the TCCS timeline.

☐ Provide an overall development plan.

- Debrief on conversations held during stakeholder meetings.
- Set and monitor goals. Ensure the employee understands how their role fits with the goals of the team and TCCS.
- Ensure your new employee understands the services that TCCS provides and the customers we support.