



## Employee Onboarding Checklist

Welcome to Pine Technical and Community College. Congratulations on completing the Search Process and joining the Student Success team. Below are checklists for each stage of the onboarding process. Please ensure that you complete all four sections with your supervisor (me), Farfum Ladroma, Director of Student Success. The finished checklist should be returned to the Chief Human Resource Officer (CHRO) at the One Month follow-up meeting.

If you have any questions, comments, concerns, or require any special accommodations to participate in any of items below—please reach out to me via in-person, email ([farfum.ladroma@pine.edu](mailto:farfum.ladroma@pine.edu)), or phone—320.629.5161. Thank you and welcome aboard!

- Checklist 1: Before Employee's First Day
- Checklist 2: First Day
- Checklist 3: First Week
- Checklist 4: Weeks 2-4

*\*\*Self reflection assignments are required as part of the onboarding process (see notes below).*

### Onboarding Checklist (Supervisor Completes)

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

Position: REGISTRAR

Bargaining Unit: MAPE-3

Supervisor: Farfum Ladroma, Director of Student Success

Start Date: Wednesday, August 2, 2023

### Section 1: Before Employee's First Day

#### **Welcome message to employee (1-2 Weeks prior to start date)**

- Send personal welcome email to employee in personal email
  - Prepare "Welcome to PTCC" card with all department staff welcome message Include first name, last name
  - Inquire about preferred pronouns
  - Inquire about preferred name and/or pronunciation of name
  - Inquire about preferred learning style for onboarding plans



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- Login to Supervisor Tools on Employee Home and change employee status.  
([https://mnscu.sharepoint.com/sites/isrsproducts/\\_layouts/15/WopiFrame.aspx?sourcedoc=%7B26A39561-7BE9-46BC-8F5A-108E1497B870%7D&file=Manage%20Employee%20Status%20QRG.docx&action=default](https://mnscu.sharepoint.com/sites/isrsproducts/_layouts/15/WopiFrame.aspx?sourcedoc=%7B26A39561-7BE9-46BC-8F5A-108E1497B870%7D&file=Manage%20Employee%20Status%20QRG.docx&action=default))

### **Logistics**

- Assign new office space or work area
  - Have physical plant disinfect office space or work area
- Arrange for new access (employee badge, keys)
  - Notify employee regarding official staff photo on first day
- Update signage on door/cubicle, name tags, and business cards with Marketing
- Update and submit Delegation of Authority to President's Assistant
- Follow up email to new email with the following items:
  - Parking logistics, including campus and community maps
  - Food options on campus
  - Accommodation requests during the onboarding sessions (i.e. lactation room, quiet spaces, etc.)

### **Information Technology**

- Send email to the Pine IT helpdesk announcing transfer: [helpdesk@pine.edu](mailto:helpdesk@pine.edu)
  - Include first name, last name
  - Start Date
  - Position
  - Location (including room number)
- Ensure all technology are operational and clean in office space/work area
- Prepare Bookings scheduling software and update website links
- Prepare welcome sign for campus monitors for new employee

### **Security**

- ISRS security access
- SharePoint groups
- Any other program(s) that the employee will need special access to
  - Repl
  - PowerBI
  - FSA/FAFSA website
  - MNAID
  - Other: \_\_\_\_\_

### **Human Resources**

- Schedule a transfer orientation appointment with Human Resources
- Schedule One Month Follow-up appointment with CHRO

### **Campus Community**

- Announce hire/transfer to campus
- Arrange for reception/celebration within department
- Schedule meetings with PTCC Stakeholders (President, VP, CFO, etc. (as applicable))
  - President



- Vice President
- Dean of Health Sciences and Liberal Arts
- Dean of Continuing Education and Training
- Chief Financial Aid Officer and Chief Information Officer
- Foundation
- Physical Plant
- Director of Student Affairs

### ***Department/Unit Welcome Packet***

- Position Description
- Phone list
- Campus map
- Organizational Chart
- Links to useful web sites (employee directory, academic calendar, etc.)
- Unit Handbook or guidebook (rapid reference guide, student handbook, etc.)
- Work unit policies/procedures (process for requesting leave, call-in expectations, dress standards, etc.)
- Minnesota State Catalog of Colleges
- Acceptable Use of Technology policy
- Other relevant departmental material

## **Section 2: First Day**

Supervisor should meet and greet the employee at the beginning of the first day in the new position and block off the whole first day for onboarding. Please review the on-boarding schedule orientate them to their role.

### ***On-Boarding Overview***

- Review On-boarding process and checklist

### ***Logistics “Check-In”***

- Overview of Network Drives (S: Drive, H: Drive) and frequently used departmental documents
- Frequently asked questions (office directory, academic calendar, etc.)
- Keys and/or Badge
- Evacuation plan/emergency exits/fire drill protocol

### ***Campus Community***

- Introduction to immediate coworkers
- Tour of office space/immediate campus location
- Orientation to college/department/institution structure

### ***One on One meeting with supervisor***

- Review the Department/Unit Welcome Packet
- Orientation to the job (what you will be doing, how it fits into the unit and organization mission)
  - Position Description Review/Sign, return original to HR office
- Orientation to the work unit (what we do, how it fits with the organization mission)
  - Review Strategic Plan and relation to new employee



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- Review Institutional Assessments and relation to new employee
  - Review Strategic Enrollment Management and relation to new employee
- Key policies and work procedures specific to your department
  - Work hours, breaks, expectations of professional dress
  - Equipment usage
- Introduce Communication Styles
  - Supervisor style and expectation
  - New employee style and expectation
  - New employee praise and recognition—preferred ways

### ***First meeting with HR***

- Benefits and payroll information
- Ensure access and explain requirements for training, if applicable
  - New Admin
  - Science of Supervision
  - Art of Supervision

### ***Lunch with other department staff members***

- Invite new and current employees for lunch
- Provide a short time for current staff to interact with new employee without supervisor
  - Share roles
  - Share past celebrations in the past year as a department
  - Share future goals as a department

### **\*\*SELF REFLECTION ASSIGNMENT\*\***

- Introduce self-reflection assignments, due after the first four weeks of onboarding via Word document/email to supervisor. Self-reflections must be submitted no later than 8:00 AM the following week, Monday.

## **Section 3: First Week**

### ***One on One meeting with supervisor***

Work expectations:

- Review specifics of position description, performance expectations, evaluation process
- Discuss probationary period and evaluation process
- Department protocol (how phone is answered, e-mail signatures, etc.)

Procedures:

- How to request vacation time
- Staffing levels needed in unit (if pertinent)
- Sick leave policies and call-in/notification procedures
- Overview of work processes (purchasing procedures, expense reimbursements, etc.)
  - Review available forms and where to locate them
- Confirm understanding of Vehicle use policy and completion of driver's license check
- Introduce and/or reiterate data privacy and employee code of conduct rules



- Room Scheduling and PTCC Vehicle Process

**\*\*SELF REFLECTION ASSIGNMENT: WEEK 1\*\* Due 8 AM, Monday Week 2**

- Review PTCC's Mission, Vision, and Values statement. Which statements resonates to you the most? Please explain why.
- In your own words, what makes a successful Institutional Research and Effectiveness-Financial Aid Coordinator?
- What are your strengths that others may not know about you, particularly when working between students and/or your colleagues?
- What was the most important item you learned this week?
- What areas are you looking forward to learning in the next four weeks?

## Section 4: Weeks 2-4

### ***Campus Community***

- Schedule 30-min "Job Shadowing" meetings with pertinent employees
- "Meet and Greets" with colleagues in other work units
- College Committee opportunities and meeting structures
  - Inquire new staff interests and also link position roles to committee assignments
- Schedule "Meet and Greets" with various union stewards
- Introduction to Appreciative Education (Appreciative Campus)

### ***Systemwide Community***

- Introduce to Institutional Research and Effectiveness workgroup across the system
- Introduce to Financial Aid Director workgroup across the system
  - Introduce to Northwest Financial Aid workgroup/team
- "Meet and Greets" with colleagues in other work units

### ***Ongoing meetings with supervisor***

#### Work expectations:

- Feedback on work expectations and activities
- Get their feedback about how things are going
- What can I do (the supervisor) to help you be successful?
- Check-in regarding development opportunities
- Individual development planning (what do I need to do to pass probation?)
- Training and development opportunities: What do you need now? What do you need in the first year?
- Follow up regarding how their work fits into unit and campus work plans

#### Procedures:

- Reminder about Health and safety on the job: building evacuation procedures, what to do if injured, etc.)
- Reminder about benefits election deadlines



**\*\*SELF REFLECTION ASSIGNMENT: WEEK 2\*\* Due 8 AM, Monday Week 3**

- After attending your first department meeting, what are your thoughts of the communication and dynamic style(s) of the department? What do you think are some ways you can enhance the group with incorporating your line of work (Institutional Research and Financial Aid).
- What is your “why” in working in higher education?
- What is your approach in balancing work and your life outside of work? How can your supervisor and team best support your mental health?
- How do you like to receive and/or given praise?

**\*\*SELF REFLECTION ASSIGNMENT: WEEK 3\*\* Due 8 AM, Monday Week 4**

- You were introduced to PTCC’s practice of Appreciative Education. What are your initial thoughts over Appreciative Education?
- Describe one professional and one personal goal you have for yourself in the next month? What can your team help you achieve these goals?
- How do you describe your ideal workflow/process style?
- What do you consider as “time wasters” as it pertains to your work?

**\*\*SELF REFLECTION ASSIGNMENT: WEEK 4\*\* Due 8 AM, Monday Week 5**

Review Strategic Plan, Institutional Assessment, and Strategic Enrollment Management plan. What item(s) stood out for you for each one. How do you see your role support the mission and goals?

- What challenges do you expect to encounter in your first six months in the role? How can I and your colleagues support you in overcoming these challenges?
- What five skills/competencies would you like to further develop and grow in the next six months?
- What has been one win or highlight you have experienced so far?
- What has been one surprise you have experience so far?

At the completion of the checklist, please sign and date below with confirmation of the employee. The employee will then bring this checklist to the One Month Follow-Up appointment with CHRO to complete the On-boarding Process.

Supervisor: \_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Date)

Employee: \_\_\_\_\_  
(Signature)

\_\_\_\_\_  
(Date)

Received by HR: \_\_\_\_\_  
(Date)