On-boarding a New Employee Before Arrival – Two weeks before

X Employee’s Name:

Employee’s Start Date:

ONBOARDING A NEW EMPLOYEE CHECKLIST

The supervisor is responsible for the completion of items on the list unless noted.

Once an offer has been accepted:

**Please note Human Resources will not give us an empl id until the Thursday or Friday before orientation. We may not get a network ID until the day the new employee is in orientation. Some items listed below can not be done until the last minute.

When an offer has been accepted please send a copy of the Offer Letter to your HRA - Carol Tysh

Set up a meeting with supervisor/director and staff to go over the On-boarding Process with Carol

BEFORE EMPLOYEE ARRIVES

Send a welcome note or give your new employee a call

Some things you might want them to know:

  - Your contact information
  - Exact directions to their new office
  - Let them know they will have an onboarding peer
  - Agenda for the first day

Send a welcome note out to the division, be sure to include information about their background and how you see their role in the division.

Onboarding peer send a welcome note - look forward to meeting you - brief background

Lou should send a welcome note - Welcoming them to the division

Fill out New Employee Information Sheet

Office preparation

Office ready-     Make sure office is clean

Stock space with office supplies

Office mailbox

Office nameplate
On-boarding a New Employee Before Arrival – Two weeks before

- **Computer ready** - 
  Student Affairs IT  368-1959 or email sasupport@case.edu
  Order a new computer if needed – contact Student Affairs IT
  Reformat an existing computer

- **Telephone ready** - 
  Student Affairs IT can order you a new phone
  Reformat an existing phone must go through Telephone Services
  [http://www.case.edu/its/phone/voicemail.html](http://www.case.edu/its/phone/voicemail.html) - Pam Hall 368-4395 or email pjh11@case.edu

- **Cellphone ready** - 
  Cellphone use must be approved by the Vice President of Student Affairs
  Check with Student Affairs IT for compatibility issues
  To order cellphone service and cellphone -[http://www.case.edu/its/phone/mobilephones.html](http://www.case.edu/its/phone/mobilephones.html)
  Student Affairs IT group can assist in the setup of a cellphone.

- **Access to H Drive and Harold** - This is done by filling out
  a New Staff form on the Student Affairs IT website
  [http://students.case.edu/support/request/newuserstart.aspx](http://students.case.edu/support/request/newuserstart.aspx)

- **Access to PeopleSoft Financials, T and E, and HCM - HRA, Carol 368-2022 or cst7**
  Access to PeopleSoft Financial - full access will not be granted until CAPS Coarse are complete
  [http://www.case.edu/its/training/capscourses.html](http://www.case.edu/its/training/capscourses.html)

- **Appointments** - 
  Make a 30 minute appointment to speak with Lou Starks (VP would like to meet all new hires - 368-2020 Rachel/Doreen)

- **Building Access** - 
  Make a one appointment to speak to our Asst VP together (Dean, Sue, and Dennis) Rachel 368-2020
  Usually someone in your department is responsible for granting building access -
  if no one is available call Doreen 368-2021. She can get access for anyone in the division.
  Otherwise, an email to access@case.edu stating the new employee's name and id along with access hour

- **Key Access** - 
  Must be a requestor or approver to go to the online key request
  Make sure you have employee network id, building/office, and key code.
  Both Dennis 368-6061 dkr3@case and Doreen 368-2021 are requestor/approver is you need assistance.

- **Agenda** - 
  Prepare a work agenda for the first day of work - get them started on a project or task -
  To get your new employee off to a good start you should plan on spending a good part of the day with them.
### Employee Orientation Folder

All items below this line will be collected by the HRA to give to the supervisor the day before a new employee arrives.

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Description</td>
<td>Sometimes the Recruiter will send them a copy. HRA Carol</td>
</tr>
<tr>
<td>Org Chart</td>
<td>In Org Sync</td>
</tr>
<tr>
<td>Mission Statement</td>
<td>The department mission statement</td>
</tr>
<tr>
<td>Strategic Plan</td>
<td>The department's strategic plan</td>
</tr>
<tr>
<td>Division</td>
<td>Mission Statement - HRA Carol</td>
</tr>
<tr>
<td>Division</td>
<td>Information about all of our departments</td>
</tr>
<tr>
<td>Division</td>
<td>Organizational Chart is in Org Sync</td>
</tr>
<tr>
<td>Division</td>
<td>University and Division Acronyms</td>
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</tbody>
</table>