NEW EMPLOYEE CHECKLIST FOR SUPERVISORS

Two Weeks before Arrival of New Employees – Supervisor

☐ Contact the ITS Support Center (x4222 or support@colby.edu) for the following:
  ➢ Computer
  ➢ E-mail address (This step cannot be completed until the employee is hired in Workday by HR.)
  ➢ Request a department phone or cell phone, if needed
  ➢ Obtain required permissions for Okta, Fileservers (etc.)

☐ Order:
  ➢ Business cards and nametag as appropriate (https://identity.colby.edu/print/ordering/)
  ➢ Colby credit card from Financial Services (x4125), if needed
  ➢ Key(s) for office (Facilities work order - https://www.colby.edu/facilities/facilities-and-sevice-requests/)

☐ Prepare office area for general use (desk, pens, pencils, stapler, etc.)

☐ Update employee’s calendar for first week or two, including new hire orientation, meetings with colleagues, key campus partners, and outside constituencies as appropriate

☐ Consider specific department needs

Prior to or on the First Day of Employment

Complete or Finalize Hiring Forms

☐ Schedule an in person meeting with HR (Roberts Building)
  ➢ Form I-9, Employment Eligibility Verification
    ▪ New hires must complete and have the legally mandated I-9 form approved on or before their first day of employment. A person cannot start without this being fully compliant with federal regulations.
    ▪ New hires must provide forms of current [not expired] identification as stated in the Instructions for Form I-9
  ➢ Parking sticker from Security (Roberts Building, first floor); license plate number and vehicle description needed

☐ Log into Workday to complete additional onboarding
  ➢ Enter/Update Personal Information
  ➢ State and Federal Tax Forms (W-4)
  ➢ Direct Deposit Authorization

☐ Colby login/password, if not done already; stop by ITS Support Center in Lovejoy 146 (bring photo I.D.), or call x4222 (Required to complete the above onboarding.)

☐ New Hire Orientation (includes Welcome, FERPA/Title IX, and Benefits overview) - to be scheduled within first month of employment

☐ Pre-employment Background Check and/or Physical (dependent on position) must be completed prior to start of work, if applicable

Supervisor or Designate

☐ ColbyCard (ID) by calling (ext. 4222) or by emailing (colbycard@colby.edu), and scheduling with the ITS Support Center located in Lovejoy 146

☐ Time entry and absence requests (review process in Workday)

☐ Tour building and campus; to schedule a campus tour through Admissions, call ext. 4800

☐ Orient to role and responsibilities

Rev: August 2021
First Week of Employment – Supervisor
- Internal Training on, as appropriate:
  - Gmail including auto-reply
  - Google Calendar
  - Workday
  - Jenzabar CX (CARS) training, if applicable
  - myColby Portal
  - Facilities Work Order Request system
  - Room scheduling procedures (including event setup and Dining Services)
  - Connect-Ed emergency system
  - Department Cards (copiers, meals)
  - Phone system/voicemail basics
  - Pulse Secure (remote desktop access)
- Review Policies/Procedures, as appropriate:
  - Employee dining privileges
  - Mailroom package designee
  - Travel services and reimbursements
  - Office supply orders (preferred vendor(s))
- Reinforce the benefits of working at Colby
- Identify and address any additional training needs
- Review schedule for first few weeks, as well as provide a schedule of any regular departmental or divisional meetings (weekly, bi-weekly, monthly, etc.) required to attend
- Overview of department and key stakeholders
- Review job description, outline duties and expectations
- Discuss communication expectations
- Introduce to colleagues in and outside of department
- Other position and department items

First Month of Employment – Supervisor
- Review Financial Services, as appropriate:
  - Accounts Receivable
  - Accounts Payable (check requests)
  - Budget reporting
- Reinforce performance, conduct, and behavior expectations as appropriate
- Discuss and establish goals; create an Individual Development Plan (contact HR for a template)
- Highlight appraisal process; provide employee with a blank performance appraisal to help employee understand performance objectives
- Continue to provide timely, ongoing, and meaningful feedback
- Communicate and invite the new employee to appropriate events
- Establish plan for anything else needed during coming months

Beyond the First Month – Supervisor
- Schedule a three-month performance check-in with employee
- Prior to six-month anniversary, conduct a six-month performance evaluation to determine whether employee has successfully completed probationary period
- Other departmental priorities

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