



## SUPERVISOR Onboarding Checklist



Employee Name:	
Job Title:	
Start Date:	

### Part 1: Prior to starting...

	<p><b>Develop a Plan</b></p> <p>Review the position and develop a plan and timeline to integrate the new employee into their role. This may include training, job shadowing with another team member, arranging meetings with other coworkers, assigning a 'buddy' to learn from, and following up at set intervals to check in for progress and areas that require assistance.</p> <p>Coordinate your plan with the HR Coordinator so that the Memo sent to the employee for their first day will align with your plans for the first day/week.</p>
	<p><b>Include your Team</b></p> <p>Speak with your team and other employees that will be working with the new employee and develop a strategy as to how you can best integrate the new member into your team and ensure they are successfully integrated into learning their new role as well as socialized into Western Engineering and specifically your department.</p>
	<p><b>Assign a volunteer 'buddy'</b></p> <p>If possible assign a peer buddy that the employee can go to for questions and guidance on the little things. Often a new employee doesn't want to 'bother' their supervisor and having an assigned person to ask questions will help the employee adjust and learn quickly and confidently to their role and also the culture of the organization. This could be a team member (volunteering) in the same department and a timeline such as 1 month could be set initially.</p>
	<p><b>Lunch Welcome – First Day</b></p> <p>As a best practice, if possible, coordinate a lunch out with the new employee for their first day</p>
	<p><b>Office Space &amp; Supplies</b></p> <p>Coordinate where the new employee will be sitting and arrange to have office supplies they will require set up in advance. Further office supplies can be obtained and or ordered as needed once they have started. Western stationary supply ordering process:</p> <p><a href="http://uwo.ca/finance/purchasing/office%20supplies.html">http://uwo.ca/finance/purchasing/office%20supplies.html</a></p>
	<p><b>Employee Door Sign, Business Cards, &amp; Name Tag</b></p> <p>Coordinate ordering name tag, business cards and a door sign for the employee. Name tags can be requested through the Dean's Assistant (Sue Chapman) or the Department Administrative Officer.</p> <p>The square clear door plates can be requested through the Facilities Manager (Mike Gaylard) and the black desk name plates and business cards can be ordered using Western stationary supply ordering process: <a href="http://uwo.ca/finance/purchasing/office%20supplies.html">http://uwo.ca/finance/purchasing/office%20supplies.html</a></p>

	<p><b>Complete the ITG New Employee Set up Form</b></p> <p>Complete the ITG New Employee set-up form in advance of first day of employment. You will require the employees name and Western email address and what network drives the employee will need access to once they start.</p> <p>*The ITG New Employee Set up Form is attached to this document for your convenience*</p>
	<p><b>Computer and Software Requirements</b></p> <p>Contact ITG to discuss computer and software requirements for the employee as necessary to their specific position.</p>
<p><b>Part 2: First Day/Week</b></p>	
	<p><b>First Day Memo</b></p> <p>Review the employees first day memo (Ask for a copy from the HR Coordinator)</p>
	<p><b>Walk over with the employee to get a WesternOne ID Card</b></p> <p>This is often coordinated for the first day and will be included in the First Day Memo so check the memo schedule to confirm the date and time.</p> <p>You will walk over to Student Central in Western Student Services Building, Room 1120. The employee will take a photograph and receive their card. This is an opportunity to talk with the new employee and to let them know about some of the other food venues and services available at the UCC.</p> <p>*If the employee was previously a student or worked at Western they may already have a card</p>
	<p><b>Review the Role</b></p> <p>With the employee, review the role and the expected outcomes (ensure they understand what is expected of them during the first few weeks)</p> <p>This is an opportunity to integrate the plan you developed and communicate it with the employee.</p> <p><b>Also discuss the following:</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Working hours, and how lunches and breaks are managed</li> <li><input type="checkbox"/> Telephone, e-mail and internet use, as well as copy and fax use</li> <li><input type="checkbox"/> Protocols for sharing common resources (printer, fax, etc.)</li> <li><input type="checkbox"/> Covering of absences</li> <li><input type="checkbox"/> How to notify supervisor of planned or emergency absence</li> <li><input type="checkbox"/> Unit social events</li> <li><input type="checkbox"/> Unit Health and Safety practices</li> <li><input type="checkbox"/> Probationary period (if applicable)</li> <li><input type="checkbox"/> Formal and informal performance management and performance development</li> </ul>
	<p><b>Communication</b></p> <p>Let the employee know how best to communicate with you and how they should receive support as they orient to their role and who will provide this support.</p>
	<p><b>Assign the volunteer 'buddy' (if applicable)</b></p> <p>If a 'buddy' was organized for the new employee communicate their purpose and let me know they are there to assist as they transition into their role.</p>

	<p><b>Introduction to Department &amp; Team Members</b></p> <p>Introduce the employee to the team and coworkers they will be working directly with. This is an opportunity to explain each role and how it relates to the department and the organizational structure as a whole. Link the employee's role and how they will interact with each member to develop a better understanding of the department and organizations mission, vision, and values.</p>
	<p><b>Work Area &amp; Department</b></p> <p>Familiarize the employee with the physical space of their work area and their specific department:</p> <ul style="list-style-type: none"> <li>• Where their desk, phone, office area is located</li> <li>• Where to find supplies, printer, fax, etc.</li> <li>• Where to hang their coat</li> <li>• Store/eat their lunch</li> <li>• Where the washrooms are</li> </ul> <p>If an employee requires an ergonomic assessment please refer them to HR.</p>
	<p><b>Review office policies and procedures</b></p> <ul style="list-style-type: none"> <li>• After hours and weekend office access</li> <li>• Office organization (files, supplies, etc.)</li> <li>• Office resources (directories, manuals, documentation)</li> <li>• Staff meetings</li> </ul>
	<p><b>Request for Access Forms</b></p> <p>As required for their role, on the first day, the employee should be assisted to fill out the "Request for Access to Corporate Information" form to allow for access to PeopleSoft HR, HE and/or Financial, ROAMs, etc. as applicable to the position. This form is to be filled out and submitted to the <b>Computer Accounts Office</b> (SSB 3300); Fax 519 661-3486. Current/transferred employees will need to fill out a new form for Engineering as their home until access is terminated. This form must be signed by Director of Administration.</p> <p><a href="https://wts.uwo.ca/identity/identity_support/CDA.pdf">https://wts.uwo.ca/identity/identity_support/CDA.pdf</a></p> <p>There is an additional form that would need to be filled out "Request for Access to Human Resource Data, Transactions and Reporting" for applicable positions. Send the original completed and signed request to the Director of Administration who will then request access online.</p> <p><a href="http://www.uwo.ca/hr/admin/form_doc/authorization/hr_access_form.pdf">http://www.uwo.ca/hr/admin/form_doc/authorization/hr_access_form.pdf</a></p> <p>(note: login required to HR Administrator Toolbox)</p> <p>For those staff who will need to have signing authority for specific department/units, a "Signing Authority Human Resource Data and Transactions" form must be filled out and submitted to the Director of Administration.</p> <p><a href="https://www.uwo.ca/hr/admin/form_doc/authorization/signing_authority.pdf">https://www.uwo.ca/hr/admin/form_doc/authorization/signing_authority.pdf</a></p> <p>(note: login required to HR Administrator Toolbox)</p>

	<p><b>Vacation Tracking</b></p> <p>Employees are to fill out a monthly vacation/time sheet and submit to their supervisor at the end of each month for approval and submission to the Dean’s Office for tracking in our Timetracker system.</p> <p>Review the vacation request process with the employee</p> <p>Current/transferred employees (e.g. employees on secondment from another unit) will be able to transfer up to 10 days to Engineering from their previous unit – this will be communicated to the Dean’s Office once the staff member begins working in Engineering for tracking in Timetracker.</p> <p>Let the employee know that they can access Timetracker to review their vacation balance at:  <a href="https://webapps.uwo.ca/timetracker/">https://webapps.uwo.ca/timetracker/</a></p>
	<p><b>Performance Reviews</b></p> <p>UWOSA employees participate in a Performance Review and Development process annually.</p> <p>Discuss this process with the employee (if applicable)</p> <p>PMA employees participate in a Western PMA Performance Dialogue and Goal-Setting process annually.</p> <p>Discuss this process with the employee (if applicable)</p>
	<p><b>Personal Protective Equipment</b></p> <p>Determine if personal protective equipment is required for this position and ensure that the employee has the necessary equipment and understands how to use it properly.</p>
	<p><b>Health and Safety Training</b></p> <p>Communicate with the employee the required training for all roles and any other specific training required for their specific position. This is to be completed online.</p> <p>Complete <a href="#">Health and Safety Training</a> online</p> <ul style="list-style-type: none"> <li>• <b>Required training for all roles:</b> <ul style="list-style-type: none"> <li>○ <a href="#">Accessibility at Western (AODA) - Service</a></li> <li>○ <a href="#">Workplace Hazardous Materials Information System (WHMIS) - Comprehensive</a></li> <li>○ <a href="#">Employee Health &amp; Safety Awareness / Supervisor Health &amp; Safety Awareness</a></li> <li>○ <a href="#">Safe Campus Community - Preventing Harassment, Violence and Domestic Violence at Western (Violence in Workplace Bill 168)</a></li> </ul> </li> </ul> <p><i>Note: All individual links above direct you to OWL (Online Western Learning) Portal to complete the specific training</i></p> <ul style="list-style-type: none"> <li>• <b>Required training based on role. Please determine and communicate based on role:</b> <ul style="list-style-type: none"> <li>○ <a href="#">Laboratory Safety</a> (When you register, search for the course number "LABHW")</li> <li>○ <a href="#">Biosafety</a> (When you register, search for the course number "BIOSA")</li> <li>○ <a href="#">Radiation</a></li> <li>○ <a href="#">X-Ray Safety</a> (Complete the registration form and submit, you will receive a follow-up email message with further instructions)</li> <li>○ <a href="#">Laser Safety</a></li> </ul> </li> </ul>

Part 3: Helpful Information / Links	
	<p><b><u>Western Links:</u></b></p> <ul style="list-style-type: none"> <li>• <a href="#">Campus Maps</a></li> <li>• <a href="#">Holiday Schedule</a></li> <li>• <a href="#">Western Building Acronyms</a></li> <li>• <a href="#">Human Resources (Western)</a></li> <li>• <a href="#">Research Western</a> (<i>information on research and funding opportunities</i>)</li> <li>• <a href="#">Financial Services</a> (<i>information on travel discounts, Professional expense reimbursements, finance policies</i>)</li> <li>• <a href="#">Western Information Technology</a> (<i>computer resources for your '@uwo.ca' account</i>)</li> <li>• <a href="#">Teaching Support Centre</a> (<i>resources on teaching support, research resources, mentoring, Faculty programs &amp; information sessions</i>)</li> <li>• <a href="#">Western Book Store</a> (<i>information on ordering classroom materials</i>)</li> <li>• <a href="#">Western Libraries</a></li> <li>• <a href="#">Rehabilitation Services</a> (<i>information on work accommodations and ergonomics assessments</i>)</li> <li>• <a href="#">Central Human Resources</a></li> <li>• <a href="#">School of Graduate and Postdoctoral Studies (SGPS)</a></li> <li>• <a href="#">Office of Faculty Relations</a></li> <li>• <a href="#">Campus Recreation</a></li> <li>• <a href="#">Western News</a></li> </ul>
	<p><b><u>Engineering Links:</u></b></p> <ul style="list-style-type: none"> <li>• <a href="#">About Engineering</a> (overall glance of Western Engineering) / <a href="#">Engineering's Strategic Plan</a></li> <li>• <a href="#">Undergraduate Services (US)</a></li> <li>• <a href="#">Postgraduate Education (PGE)</a></li> <li>• <a href="#">Research - Engineering</a></li> <li>• <a href="#">Engineering Help Desk</a> –<i>Computer/printer related issues can be initially directed here (ext:88112)</i></li> <li>• <a href="#">Departments</a> <ul style="list-style-type: none"> <li>*<a href="#">Civil &amp; Environmental Engineering</a></li> <li>*<a href="#">Chemical &amp; Biochemical Engineering</a></li> <li>*<a href="#">Electrical &amp; Computer Engineering</a></li> <li>*<a href="#">Mechanical &amp; Materials Engineering</a></li> </ul> </li> <li>• <a href="#">Institutes &amp; Groups</a> <ul style="list-style-type: none"> <li>*<a href="#">Boundary Layer Wind Tunnel Laboratory</a></li> <li>*<a href="#">Institute for Chemical and Fuels from Alternative Resources (ICFAR)</a></li> <li>*<a href="#">Insurance Research Lab for Better Homes</a></li> <li>*<a href="#">Wind Engineering, Engineering and Environment Dome (WindEEE)</a></li> <li>*<a href="#">Fraunhofer Project Centre for Composites Research (FPC)</a></li> </ul> </li> <li>• <a href="#">University Machine Services (UMS)</a></li> <li>• <a href="#">Engineering Dean's Office</a> <ul style="list-style-type: none"> <li>* <a href="#">Alumni &amp; Development</a></li> <li>* <a href="#">Communications</a></li> <li>* <a href="#">Finance &amp; Stores</a></li> <li>* <a href="#">Human Resources</a></li> <li>* <a href="#">Co-op &amp; Career Services</a></li> <li>* <a href="#">External Services</a></li> </ul> </li> <li>• <a href="#">Intranet (Eng Account)</a> – Must log in with EngAccount ID/Password</li> <li>• <a href="#">Time Tracker</a></li> <li>• <a href="#">Engineering Events Calendar</a></li> <li>• <a href="#">Engineering Faculty/Staff Awards</a></li> </ul>

