Supervisor’s Role in Employee Onboarding - Checklist

Supervisors play a pivotal role in onboarding. Resources are provided to help supervisors, employees and HR Contacts. 1.) Visit the Onboarding New Employees webpage for supervisor resources and tutorials. 2.) Direct employees to the New Employee Guide for step-by-step onboarding actions. 3.) Reference Job Aids within Onboarding Tips and Guides for onboarding questions.

<table>
<thead>
<tr>
<th>Employee Responsibilities</th>
<th>Supervisor Responsibilities</th>
<th>Key Resources</th>
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</thead>
<tbody>
<tr>
<td>Complete your hire:</td>
<td><em>If you are unable to onboard your employee sufficiently, as outlined in this checklist, please assign a surrogate boarding designee to complete these actions on your behalf so that every UofSC employee receives a consistent, welcoming, and equitable onboarding experience.</em></td>
<td>Novel Coronavirus (COVID-19)</td>
</tr>
<tr>
<td>1. Sign and return your Offer Letter</td>
<td>☐ Remind employee to look for the items to the left to <strong>complete their hire</strong>. These tasks ensure they gain access into important systems. Quite a few are time sensitive and require immediate action upon receipt or they expire.</td>
<td>Safety Information</td>
</tr>
<tr>
<td>2. Complete Pre-hire tasks in PeopleAdmin</td>
<td>☐ Prepare employee’s physical workspace.</td>
<td>Faculty and Staff Gateway</td>
</tr>
<tr>
<td>3. Complete Section 1 of the I-9 Form</td>
<td>☐ Request technology and add employee to all systems, MS Teams, and distribution lists.</td>
<td>DoIT</td>
</tr>
<tr>
<td>4. Gather important documents needed to establish your identity on your first day</td>
<td>☐ Plan for a successful first day by communicating where to park, who to meet on their first day, what to wear, provide dining or kitchenette options, outline their agenda for their first day, etc.</td>
<td>Pay and Benefits</td>
</tr>
<tr>
<td>5. Complete your Background Screening within Hire Right</td>
<td>☐ Inform other employees of the new employee’s arrival. Clarify their role and how they fit into your unit.</td>
<td>Pay information</td>
</tr>
<tr>
<td>6. Claim your University Account</td>
<td>☐ Ensure faculty attend orientation, download syllabus templates, order textbooks and view Class Logistics Pg.</td>
<td>Pay schedules</td>
</tr>
<tr>
<td>7. Review transportation and parking options close to your place of work</td>
<td>☐ Ensure faculty attend orientation, download syllabus templates, order textbooks and view Class Logistics Pg.</td>
<td>Holiday schedule</td>
</tr>
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</table>

**Faculty:**

<table>
<thead>
<tr>
<th>First Day</th>
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</thead>
<tbody>
<tr>
<td>1. Complete <strong>onboarding tasks</strong> in PeopleSoft Employee Self-Service (ESS, HR/Payroll system)</td>
</tr>
<tr>
<td>2. Understand <strong>University IDs</strong></td>
</tr>
<tr>
<td>3. Select <strong>Transportation and Parking</strong> options</td>
</tr>
<tr>
<td>4. Order <strong>Carolina Card</strong></td>
</tr>
<tr>
<td>5. Review <strong>Timekeeping Policies and Procedures</strong> and record any worked time in iTams if applicable.</td>
</tr>
<tr>
<td>6. Review other <strong>policies and procedures</strong> required of your position and department.</td>
</tr>
</tbody>
</table>

Employee Self Service (ESS)

**Technology and Access**

- Service Ticket
- Service Desk or 777-1800
- Multifactor Authentication
- Technology resources
- Remote access
- Wired and wireless networks

**Personalize your accounts**

- Email Signature Generator
- Voicemail
- Digital Swag
- Professional headshots

**Getting around**

- Transportation and Parking
- Campus Map
- Carolina Card

**Pay and Benefits**

- Time and Attendance (iTAMS)
- Holiday schedule
- Benefits options
- Pay information
- Pay schedules

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Rev. April 2021
**Supervisor’s Role in Employee Onboarding - Checklist**

<table>
<thead>
<tr>
<th>First Week</th>
<th>Employee Self Service (ESS)</th>
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<tbody>
<tr>
<td>1. Complete the <strong>First Week onboarding tasks</strong> in PeopleSoft Employee Self Service (ESS, HR/Payroll system).&lt;br&gt;a. Verifying address, emergency contacts, degrees&lt;br&gt;b. Self-identifying information such as veteran status, disability and ethnicity.</td>
<td><strong>Pay and Benefits</strong>&lt;br&gt;New Employee Benefits&lt;br&gt;Employee Assistance Program</td>
</tr>
<tr>
<td>2. Review and select <strong>benefits</strong>. Meet with benefits counselor if needed.</td>
<td><strong>University Information</strong>&lt;br&gt;Mission&lt;br&gt;Carolinian Creed&lt;br&gt;Strategic Plan&lt;br&gt;University Leadership&lt;br&gt;Diversity, Equity &amp; Inclusion&lt;br&gt;New Employee Orientation&lt;br&gt;New Faculty Orientation</td>
</tr>
<tr>
<td>3. Understand your <strong>expectations</strong>. Discuss your planning document and the expectations of your role. Also discuss how your role fits into the university’s strategic priorities.</td>
<td><strong>Training and Development</strong>&lt;br&gt;Personal and Professional Development&lt;br&gt;Faculty Development&lt;br&gt;Environmental Health &amp; Safety</td>
</tr>
<tr>
<td>4. Participate in New Employee Orientation</td>
<td><strong>Talent Management</strong>&lt;br&gt;Tenure and Promotion&lt;br&gt;Understanding Performance&lt;br&gt;Evaluations for employees&lt;br&gt;Managing Performance&lt;br&gt;Required LEAD Supervisor Training</td>
</tr>
<tr>
<td>5. Download important <strong>safety</strong> apps and alerts.</td>
<td><strong>Campus Safety</strong>&lt;br&gt;Emergencies: 911&lt;br&gt;Police Dispatch: 777-4215&lt;br&gt;Emergency Procedures&lt;br&gt;Fire Safety Information&lt;br&gt;Rave Guardian Safety App&lt;br&gt;Carolina Alert&lt;br&gt;Law Enforcement and Safety&lt;br&gt;Equal Opportunity Programs&lt;br&gt;Campus Safety and Wellness&lt;br&gt;Safe evening ride&lt;br&gt;Safety Tools &amp; Apps</td>
</tr>
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</table>

**Faculty:**
1. Attend faculty orientation
2. Register for New Faculty Academy
3. Download Faculty Manual

☐ **Monitor** their onboarding task completion in MSS. Reinforce **benefits** enrollment requirements (30 & 31 days). Direct them to the website and their benefits counselor.

☐ Start thinking about the **expectations** you will set through the EPMS-Planning Stage or other performance appraisal or goal-setting document. Review tenure and promotion and Unit Criteria and Procedures with faculty.

☐ Schedule on the job training to teach them the aspects of their new job. This could also include any safety, professional, or faculty training that may be required or recommended for their role.

☐ Teach employee to use any equipment needed for their job.

☐ Also help your employee understand:
  - Relationships/introductions
  - Schedule standing meetings
  - Key policies and procedures
  - Dept. priorities and objectives
  - How you communicate (formal/informal, tools, unacceptable, through conflict)
  - Team ground rules or work agreements
  - Informal rules
  - Technology tutorials
  - How you make decisions as a team
  - How you solve problems
  - For questions, assign a mentor/buddy or make sure you are available

☐ **Orient** your new employee to the office and the organization.

☐ Emphasize the University Mission and Strategic priorities and how the employee’s work and the department’s work fit in the context. Share the unit’s mission, values and strategies.

☐ Review relevant organizational charts and explain the department’s relationship to campus.

☐ Schedule a building and campus tour to meet campus partners.

☐ Review **safety** procedures and apps
  - Share department phone list and emergency contacts. Ensure employee completes emergency contact information in Employee Self-Service (ESS).
  - Review departmental and organizational emergency procedures and encourage your employee to download all important safety apps and alerts.

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## Supervisor's Role in Employee Onboarding - Checklist

### First Month

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<tbody>
<tr>
<td>1.</td>
<td>Check the accuracy of your <strong>pay stub</strong></td>
<td>☐ Finalize the <strong>EPMS Planning Stage</strong> with the employee to outline their expectations and measures of success.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td>Elect to receive the annual <strong>W2</strong> electronically</td>
<td>☐ Ensure the employee reviews their <strong>pay stub</strong> for accuracy.</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>Elect to receive the annual <strong>1095C</strong> form electronically</td>
<td>☐ Notify the employee that they can elect to receive their <strong>W2</strong> and <strong>1095C</strong> electronically.</td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td>Verify/Update your <strong>address</strong></td>
<td>☐ Employees, especially relocations, should ensure their <strong>address</strong> is correct in Employee Self-Service.</td>
<td></td>
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**Faculty:**

1. Attend new Faculty Academy
2. Identify a Mentor in Dept.
3. Review CTE Website

### First Year

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<tbody>
<tr>
<td>1.</td>
<td>Connect to <strong>groups on campus</strong> who share common interests.</td>
<td>☐ Provide ongoing feedback about the employee’s progress on expectations outlined in the EPMS Planning Stage. Recap and record progress in the EPMS annual review process.</td>
<td></td>
</tr>
<tr>
<td>2.</td>
<td>Take care of your <strong>personal wellbeing</strong> through the many wellness opportunities available on our campus.</td>
<td>☐ Invest in your employee by creating an individual development plan (IDP) and recommending <strong>personal and professional development</strong> opportunities offered on campus. These developmental opportunities motivate and empower employees.</td>
<td></td>
</tr>
<tr>
<td>3.</td>
<td>Collect your accomplishments from the past year to discuss during your <strong>annual evaluation.</strong></td>
<td>☐ Guide your employees to find <strong>affinity groups</strong> on campus to connect and engage on campus and professional groups and organizations in the employee’s field of work.</td>
<td></td>
</tr>
<tr>
<td>4.</td>
<td>Prepare an <strong>Individual Development Plan (IDP)</strong> to articulate how you would like to grow professionally in the coming year. (stretch assignments, new skill, networking, etc.)</td>
<td></td>
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</tr>
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</table>

**Faculty:**

1. Enhance your research efforts
2. Meet regularly with mentor
3. Explore certificate programs for continued development

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**Employee Self Service (ESS)**

- **Connect on Campus**
  - Faculty and Staff Gateway
  - @UofSC Today eNewsletter
  - Inside Carolina
  - Facebook
  - Twitter
  - Instagram
  - LinkedIn
  - News and Events
- **Pay and Benefits**
  - Privileges, Perks and Discounts
- **Faculty**
  - New Faculty Academy
  - CTE Teaching Resources

**Training and Development**

- Personal and Professional Development
- Faculty Development
- Individual Development Plan
- Continuing Education Programs

- **Connect on Campus**
  - Affinity Groups
- **Getting Around**
  - Explore Columbia
  - City of Columbia
  - Experience Columbia SC
  - Fit Walk Paths Map

- **Wellness**
  - Wellness & Prevention
  - Gamecocks LiveWell
  - Campus Recreation: Gym membership, rock walls, aquatics, rent equipment or gear

- **Faculty**
  - Office of Sponsored Awards Management (SAM)
  - Office of Research Compliance (ORC)
  - CTE Certificates of Completion Programs

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*Job Aids are available to provide step-by-step tutorials to navigate actions in all onboarding systems for Employees, HR Contacts, and Managers.*