Supervisor's Role in Employee Onboarding - Checklist

University of South Carolina

Supervisors play a pivotal role in onboarding. We provide several resources to help supervisors, employees and HR Contacts be successful. 1.) Managers should visit the Onboarding New Employees webpage for supervisor resources and tutorials. 2.) Managers can direct their employees to the New Employee Guide for step-by-step onboarding actions. 3.) Managers, Employees and HR Contacts can reference Job Aids within Onboarding Tips and Guides for questions while onboarding in systems.

	Employee Responsibilities	Supervisor Responsibilities	Key Resources
Before They Arrive	**Complete your hire**: 1. Sign and return your Offer Letter 2. Complete Pre-hire tasks in PeopleAdmin 3. Complete Section 1 of the I-9 Form 4. Gather important documents needed to establish your identity on your first day 5. Complete your Background Screening within HireRight 6. Claim your University Account 7. Review transportation and parking options close to your place of work **Faculty:** 1. Register for faculty orientation 2. Prepare your teaching materials	*If you are unable to onboard your employee sufficiently, as outlined in this checklist, please assign a surrogate onboarding designee to complete these actions on your behalf so that every UofSC employee receives a consistent, welcoming, and equitable onboarding experience.* ☐ Remind employee to look for the items to the left to **complete their hire**. These tasks ensure they gain access into important systems. Quite a few are time sensitive and require immediate action upon receipt or they expire. ☐ Prepare employee's physical workspace. ☐ Request technology and add employee to all systems, MS Teams, and distribution lists. ☐ 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. ☐ Inform other employees of the new employee's arrival. Clarify their role and how they fit into your unit. ☐ Ensure faculty attend orientation, download syllabus templates, order textbooks and view Class Logistics Pg.	Novel Coronavirus (COVID-19) Safety Information Faculty and Staff Gateway DoIT **Pay and Benefits** Pay information Pay schedules Holiday schedule Benefits options **Getting Around** Transportation and Parking Campus map Schedule a campus tour Explore Columbia **Faculty Resources** Center for Teaching Excellence Faculty orientation Faculty manual Academic calendar How to use Blackboard International scholars
First Day	1. Complete **onboarding tasks** in PeopleSoft Employee Self-Service (ESS, HR/Payroll system) 2. Understand **University IDs** 3. Select **Transportation and Parking** options 4. Order **Carolina Card** 5. Review **Timekeeping Policies and Procedures** and record any worked time in iTams if applicable. 6. Review other **policies and procedures** required of your position and department.	☐ Plan to be available for your employee's first day (or appoint an onboarding designee). Block off time to greet them and provide initial office tour (workspace, bathroom, kitchen, emergency exit) and introductions. ☐ Provide equipment and time for employee to complete the **onboarding tasks** in Peoplesoft Employee Self-Service (ESS) to ensure they receive timely pay. Monitor their progress in MSS. Refer to the New Employee Onboarding Job Aids for questions about the tasks. ☐ Ensure the employee understands their **university IDs** and has access to important systems needed to work. ☐ Assist the employee in selecting their **transportation and parking** options and sign up for their **Carolina Card**. Help the employee navigate receipt of these items. ☐ Instruct employee on how to use the **timekeeping** system to log in time and request time off. Discuss office procedures for approving time off and how to communicate unexpected or unplanned absences. ☐ Speak with your employee about other important **policies and procedures** required for their role.	**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** iTams - Time and Attendance Holiday schedule Benefits options Pay information Pay schedules

U of SC South Carolina

First Week

1. Complete the **First Week onboarding tasks** in PeopleSoft Employee Self Service (ESS, HR/Payroll system).

   a. Verifying address, emergency contacts, degrees

   b. Self-identifying information such as veteran status, disability and ethnicity.

2. Review and select **benefits.** Meet with benefits counselor if needed.

3. Understand your **expectations**. Discuss your planning document and the expectations of your role. Also discuss how your role fits into the university's strategic priorities.

4. Participate in New Employee **Orientation**

5. Download important **safety** apps and alerts.

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.

Employee Self Service (ESS)

Pay and Benefits
New Employee Benefits
Employee Assistance Program

University Information
Mission
Carolinian Creed
Strategic Plan
University Leadership
Diversity, Equity & Inclusion
New Employee Orientation
New Faculty Orientation

Training and Development
Personal and Professional Development
Faculty Development
Environmental Health & Safety

Talent Management
Tenure and Promotion
Understanding Performance
Evaluations for employees
Managing Performance
Required LEAD Supervisor Training

Campus Safety
Emergencies: 911
Police Dispatch: 777-4215
Emergency Procedures
Fire Safety Information
Rave Guardian Safety App
Carolina Alert
Law Enforcement and Safety
Equal Opportunity Programs
Campus Safety and Wellness
Safe evening ride
Safety Tools & Apps

Getting Around
Shuttles
COMET App

Brand Guidance
Brand Toolbox

Faculty
Faculty manual
New Faculty Academy
CTE Teaching Resources

First Month			
	1. Check the accuracy of your **pay stub** 2. Elect to receive the annual **W2** electronically 3. Elect to receive the annual **1095C** form electronically 4. Verify/Update **your address** **Faculty:** 1. Attend new Faculty Academy 2. Identify a Mentor in Dept. 3. Review CTE Website	☐ Finalize the **EPMS Planning Stage** with the employee to outline their expectations and measures of success. ☐ Ensure the employee reviews their **pay stub** for accuracy. ☐ Notify the employee that they can elect to receive their **W2** and **1095C** electronically. ☐ Employees, especially relocations, should ensure their **address** is correct in Employee Self-Service. ☐ Help your employees understand what is happening on our campus and in the university system by introducing them to the various ways we **communicate**. ☐ Share the **discounts and perks** available to UofSC and SC state employees. ☐ Assist Faculty in making connections on campus and finding a mentor	**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

First Year			
	1. Connect to **groups on campus** who share common interests. 2. Take care of your **personal wellbeing** through the many wellness opportunities available on our campus. **3.** Collect your accomplishments from the past year to discuss during your **annual evaluation.** 4. Prepare an **Individual Development Plan (IDP)** to articulate how you would like to grow professionally in the coming year. (stretch assignments, new skill, networking, etc.) **Faculty:** 1. Enhance your research efforts 2. Meet regularly with mentor 3. Explore certificate programs for continued development	☐ 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. ☐ Invest in your employee by creating an individual development plan (IDP) and recommending **personal and professional development** opportunities offered on campus. These developmental opportunities motivate and empower employees. ☐ Guide your employees to find **affinity group**s on campus to connect and engage on campus and professional groups and organizations in the employee's field of work.	**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

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