

# Onboarding Checklist

## EMPLOYEE INFORMATION

Name: \_\_\_\_\_ Start date: \_\_\_\_\_  
 Position: \_\_\_\_\_ Manager: \_\_\_\_\_

## FIRST DAY

HR provide employee with new hire info (email) - including key contacts list, relevant policies, and first day info.

## POLICIES AND TRAINING

- Review key policies & complete required training.
- (Employee responsible for reading and understanding required policies. See the [Operations Manual](#).*
- Supervisor: provide instructions for enrolling in trainings.)
- [Vacation](#) and [sick leave](#)
  - [FMLA/ Leave of absence](#)
  - [Holidays/ Overtime](#)
  - Time and leave reporting
  - [Performance reviews](#)
  - Dress code (per dept/supv/event)
  - [E-mail and Internet use](#)
  - Personal conduct – office standards
  - [Confidentiality](#) and [Conflict of Interest](#)
  - [Harassment Prevention Training](#)
  - [Ethics and Responsibility Training](#)
  - [Procurement Card Training](#)
  - [FERPA Training](#)
  - Emergency Procedures
  - Supervisors: New UI Supervisor: Starting Successfully & Supervisor Training@iowa
  - Other Training Identified: \_\_\_\_\_

## OFFICE

- Review general administrative procedures.
- Office/desk/work station
  - Keys
  - Work room/mail (incoming and outgoing)
  - Kitchen practices (if applicable)
  - Business cards
  - Telephones
  - Building access cards
  - Conference rooms
  - Picture ID badges (UCC)
  - Office supplies

## INTRODUCTIONS AND TOURS

- Give introductions to department staff and key personnel during tour.
- Tour of facility, including:
- Restrooms
  - Mail/Printers/Copiers/Fax
  - Office supplies location
  - Bulletin board
  - Emergency exits and supplies
  - Kitchen/Break Area
  - Surroundings (businesses/food)

## POSITION INFORMATION

- Review initial job assignments and training plans. Visit the employee [onboarding website](#).
- Review job description and performance expectations and standards.
- Review job schedule and hours.
- Review payroll schedule, time records, and related policies and procedures.

## INFORMATION TECHNOLOGY

- Hardware and software:
- Email
  - Intranet (if applicable)
  - Microsoft Office/other
  - Data on shared drives
  - Databases
  - Internet & Frequent Sites

*I acknowledge I have been provided the above listed orientation items and understand the information provided to me.*

\_\_\_\_\_  
Employee Name Date

**GENERAL - UNIVERSITY OF IOWA**

- Welcome to the University of Iowa. Here are some links you can check out to get to know what the UI is all about.
  - [The UI Strategic Plan 2022-2027 – Development](#)
  - [The IOWA Challenge – First Year Experience](#)
  - [The Student Success Team](#)
  - [The Operations Manual](#) – Policies and Procedures - A helpful place for questions during your employment.
- Here are some common campus locations you might need or want to visit.
  - [Jessup Hall](#) (JH) – Office of the Provost, Office of the President, Chief Diversity Officer, EOD, Registrar, F&O.
  - [Iowa Memorial Union](#) (IMU) – Various trainings location, dining (River Room Café, lower level express food), movies.
  - [Calvin Hall](#) (CALH) – Admissions, Student Financial Aid, Academic Support & Retention, Orientation.
  - [University Services Building](#) (USB) – Various trainings location, Employment Svcs., Facilities Mgmt., Faculty & Staff Disability Svcs. (FSDS), Family Svcs., Human Resources, Organizational Effectiveness/Learning & Development, **Benefits, Payroll**.
  - [Campus Recreation and Wellness Center](#) (CRWC) – Visit [Rec. Services](#) for more info.
- [Self Service](#) Overview – Personal tab key items
  - Payroll
    - Set Up/Change Direct Deposit (required before first paycheck date for salary payments)
    - View Paycheck History
    - Set Up/Change Tax Withholding (W-4)
  - Time Reporting
    - Employee Time Records – Regular employees: submit your accruals to cover time away from work (monthly). Students/Temp: submit your hours worked, (biweekly).
    - Absence Request – submits absence request to supervisor for approval. Check with supv. if this is required in your dept. This is put on your calendar as a request, not as time taken. To record time you must “convert” the request (see HELP option on top right of Time and Attendance calendar for instructions).
    - Vacation/Sick Leave Report – tracks your accruals (if reg. staff). Official record is one month behind.
  - Benefits
    - Benefits Enrollment – enroll in insurance, flex spending etc. online (30 days of hire). Retirement within 60 days.
    - Workers Compensation – First Report of Injury – complete if injured during work/on work-site.
  - Learning & Development
    - My Training – registration portal for ICON and other trainings offered (such as FERPA).
    - LinkedInLearning.com – online technology training portal.
  - Sexual Harassment Prevention Edu. (see offer letter for initial required training due date)
    - Instructor Led Classes – preferred method of training for first time employees.
    - Online Classes – for refresher courses, required every three years.
  - LiveWell
    - My Health and Wellness – portal to website with personalized health and wellness resources.
    - Personal Health Assessment – take annually to receive discounts and personalized resources.
  - My UI Career
    - Annual Goals and Performance Review – portal to performance evaluation, due March 31 annually.
    - Annual Total Compensation Statement – as of July 1 each year, includes benefits and total comp info.
    - My ePersonnel File – salary, job classification, personnel file docs, and appt history info.
  - General
    - Manage Duo 2-Step Verification – for managing second security access to Self Service off campus (see [ITS](#) website for more details).
    - Emergency Contacts – please enter/edit as necessary.
    - My HR Rep/Workflow Admin/Dept Admin – contact info for you.
    - University Bill – for charges on your ID card or UI account.
  - Name, Address, & Hawk Alert – update your address (restrict info in directory), update Hawk Alert preferences.
  - Travel – if you have a Pcard (reference Pcard training) or take a trip (check with your accounting contact).
  - My Parking – view a map of parking lot options, sign up for a lot (or wait list), pay parking fines.

**WELCOME TO THE UNIVERSITY OF IOWA!**

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Initials