Wharton UNIVERSITY of PENNSYLVANIA HUMAN RESOURCES

Onboarding Checklist for Managers

Within one week before candidate's start date:

- ☐ Prepare a welcome package (business cards, department organizational chart, list of important contacts, copy of the job description, etc.)
- ☐ Organize the new hire's first week (set up meetings with necessary staff, schedule lunch and training)
- ☐ Send a message to the departments staff introducing the new employee
- ☐ Arrange the work area – be sure telephone/computer, and email connections will be in place for new hire's arrival, set up desk with supplies, etc.

New hire's first day:

- ☐ Greet new hire
- ☐ Show them to their workstation
- ☐ Introduce new hire to co-workers
- ☐ Take the new hire on a tour of the department/School
- ☐ Conduct department orientation (if applicable)
- ☐ Confirm employee's new hire paperwork is complete and he/she has entered direct deposit information in Workday in time for first paycheck. Please see tip sheet here for instructions on entering information in Workday.
- ☐ Remind new hire of Penn's Vaccine mandate. Tip sheet on entering vaccine information in Workday can

be found here. Vaccine Exemption Requests can be found here.

- ☐ Direct new hire to the Onboard@Penn Center website to schedule an appointment to complete part 2 of the I-9. On scheduled appointment date, visit the Onboard@Penn Center 3425 Walnut St., with original acceptable documents .
- ☐ Direct new hire to PennCard Center website to apply for their first PennCard online then make an appointment to pick up their PennCard at the PennCard office.
- ☐ Arrange necessary training in Knowledge Link by completing the Penn Profiler Survey
- ☐ Encourage employee to attend both the School and the University New Employee Orientation

Within 1 – 2 weeks

- ☐ Meet with employee to discuss introductory review and establish expectations
- ☐ Confirm employee is attending the Wharton New Employee Orientation and the University New Employee Orientation
- ☐ Review important policies/procedures

During month one

- ☐ Meet with employee for first feedback session. **Please note:** Feedback for new hires will be entered in the old performance management system during the intro review.
- ☐ Confirm employee has received benefits package

During months two – four

- ☐ Conduct regular feedback sessions
- ☐ Review/adjust training profile in Knowledge Link
- ☐ Conduct/Complete/Extern Introductory Period review
- ☐ After New Hire successful complete the Intro Period on-going goals/expectations should be created

- ☐ Check in with employee to see if they have any questions/concerns/suggestions

Ongoing

- ☐ Conduct quarterly feedback sessions
- ☐ Establish new goals and continue to review employee's progress
- ☐ Review position responsibilities for relevance and opportunity to advance
- ☐ Discuss and develop professional development opportunities including training, conferences, mentoring, projects, cross-training, opportunity to present to management, opportunity to serve on a taskforce or committee, etc.
- ☐ Celebrate employee's accomplishments (anniversaries, outstanding effort, innovation, etc.)