# Preparing for your New Employee

***A checklist to prepare for and welcome a new full-time, benefit-eligible employee to Missouri S&T.***

## Employee Information

|  |  |  |  |
| --- | --- | --- | --- |
| Employee Name: | Click or tap here to enter text. | Job/Working Title: | Click or tap here to enter text. |
| Preferred Name: | Complete if applicable | Position Funding: | ##% GRA & ##% non-GRA |
| Employee ID: | 12345678 | SSO/Username: | Click or tap here to enter text. |
| DeptNode: | Ex: RCOMPSCI | Department Name: | Ex: Computer Science |
| Start Date: | Click or tap to enter a date. | Supervises Others: | Yes [ ]  No [ ]  |
| Employment Terms: | [ ]  Onsite [ ]  Remote [ ]  Hybrid | Typical Schedule: | Ex: M-W 8-4:30pm onsite Th-F 8-4:30pm remote. |
| HR Supervisor: | Click or tap here to enter text. |  |  |
| Office Address: | Click or tap here to enter text. | Telephone No.: | ###-###-#### |

## Before Employee Start Date

[ ]  Review all sections of the checklist to ensure you are prepared.

[ ]  Determine who will greet the new employee on their first day and reserve the date/time on their calendar.

*Record name here*.

[ ]  Send employee welcome email; see [Sample Welcome Email to New Employee](https://hr.mst.edu/media/administrative/hr/prex2fonboarding/Sample%20Welcome%20Emails%20to%20New%20Employees.docx).

[ ]  Identify technology needs and order technology if needed:

[ ]  Computer (*review* [*computer lifecycle replacement*](https://it.mst.edu/services/hardware/lifecycle-replacement/) *website; order via* [*IT ticket*](https://tdx.umsystem.edu/TDClient/48/Portal/Home/))

[ ]  Monitor(s) (*recommendation:* *order via* [*IT ticket*](https://tdx.umsystem.edu/TDClient/48/Portal/Home/))

[ ]  Keyboard/mouse (*recommendation:* *order via* [*Show Me Shop*](https://fsprd.umsystem.edu/psc/fsprd/EMPLOYEE/ERP/c/NUI_FRAMEWORK.PT_AGSTARTPAGE_NUI.GBL?CONTEXTIDPARAMS=TEMPLATE_ID%3aPTPPNAVCOL&scname=ADMN_UM_EPROCUREMENT&PanelCollapsible=Y&PTPPB_GROUPLET_ID=UM_EPROCUREMENT&CRefName=UM_EPRO))

[ ]  Printer (*order via* [*IT ticket*](https://tdx.umsystem.edu/TDClient/48/Portal/Home/))

[ ]  Telephone (*order via* [*IT ticket*](https://tdx.umsystem.edu/TDClient/48/Portal/Home/))

[ ]  Other

Click or tap here to enter text.

[ ]  [Submit IT tickets](https://tdx.umsystem.edu/TDClient/48/Portal/Home/) (if applicable):

[ ]  Software purchase(s)

*List software, Ex: Adobe, FoxIt, etc.*

[ ]  Drive access(es)

[ ]  Rename computer/Notify IT of new primary user

[ ]  Reassign telephone

[ ]  Clean the new employee’s work area

[ ]  Set up cubical/office space with basic supplies

[ ]  Make sure IT equipment is ready for the employee (if applicable); submit an [IT ticket](https://tdx.umsystem.edu/TDClient/48/Portal/Home/) for any issues.

 [ ]  Computer

[ ]  Monitor(s)

[ ]  Keyboard/Mouse *(check battery/charged*)

[ ]  Printer *(may need to provide copier code access instead of ordering/having individual printer)*

[ ]  Telephone (*ensure* [*jack is active*](https://it.mst.edu/services/phones/jacks/))

[ ]  Other

 Click or tap here to enter text.

[ ]  Consider sending an introduction email to the department about the new hire. See [Sample Introduction Emails to Department](https://hr.mst.edu/media/administrative/hr/prex2fonboarding/Sample%20Welcome%20Emails%20to%20New%20Employees.docx).

[ ]  Order (if applicable):

[ ]  [Name tag](https://brand.mst.edu/special-orders/) (*verify preferred name & title*)

[ ]  [Name plate](https://printingmail.mst.edu/nameplates/#:~:text=To%20order%20a%20custom%20S%26T%20nameplate%2C%20simply%20download,nameplates%2C%20please%20include%20the%20MoCode%20to%20be%20charged.) (*verify preferred name & title*)

[ ]  Create an onboarding agenda; see sample [Onboarding Agenda](https://hr.mst.edu/media/administrative/hr/prex2fonboarding/Onboarding%20Agenda%20Guidance%20and%20Template%206.27.25.docx).

[ ]  Create a list of critical people the employee needs to meet during their first weeks

 Click or tap here to enter text.

[ ]  Set up meetings with those individuals or provide the list to new employee for them to set meetings up after they start

[ ]  It is recommended that all employees (faculty and staff) attend the [New Employee Orientation](https://hr.mst.edu/resources/getting-started/#:~:text=New%20Employee%20Orientation,-To%20introduce%20our&text=NEO%20will%20be%20held%20in,and%20important%20policies%20and%20procedures.) (NEO) on their first day from 8:30-10:30am with Human Resources. This usually occurs in-person at 115 Centennial Hall but is sometimes held virtually. If it is virtual, you will need to have a computer set up for the new employee.

 [ ]  Confirmed NEO is in-person

 [ ]  NEO will be virtual; computer secured and tested

[ ]  Prepare applicable forms. See [Operational Reference](#_Sample_Welcome_Email) section. Hold forms for submission until day one.

[ ]  Update department organizational chart.

## Employee’s First Day

[ ] [ ] [ ]  Give a warm welcome and discuss the plan for the first day.

[ ]  Provide new employee with a copy of their onboarding agenda.

[ ]  Ensure employee attends New Employee Orientation (NEO).

[ ]  Tour the employee’s assigned workspace.

[ ]  Tour the department and building; be sure to explain where restrooms and break locations are located.

[ ]  During the tour, introduce the new employee to other staff members

[ ]  Review department (or office’s) purpose, organizational chart and goals.

[ ]  Review job description, expectations with employee, and how the employee’s job supports the department goals.

[ ]  Review office policies and procedures including:

* + Working hours
	+ Dress code
	+ Telephone, email, and internet use (e.g. email signature, personal calls/emails, etc.)
	+ Department and/or building specific safety and emergency information
	+ Office Organization (files, supplies, etc.) & Office Resources
	+ Accountability, Confidentiality, and Ethics

[ ]  Add employee to relevant email listserv(s) *(*[*via IT Ticket*](https://tdx.umsystem.edu/TDClient/48/Portal/Home/)*)*.

 *List email listserv(s)*

[ ]  Add employee to relevant [Google group(s)](https://it.mst.edu/services/google-apps/google-groups/)

 *List Google group(s)*

[ ]  Add employee to relevant Teams group(s).

 *List team group(s)*

[ ]  Send outlook invite to new employee for regularly scheduled staff and department meetings.

[ ]  Grant employee access to view calendars as needed.

[ ]  Submit pre-filled out forms that are applicable for the new hire’s position. See [Operational References](#_Operational_References) section.

[ ]  Verify employee’s [email alias](https://it.mst.edu/services/email/).

 *List employee email alias*

[ ]  [Request keys/electronic access](https://locks.mst.edu/) (note: it is likely this will not be able to be submitted until day two)

 [ ]  [Key Locks](https://locks.mst.edu/requestingandobtainingkeys/)

 [ ]  [Electronic Locks](https://locks.mst.edu/requestaccess/) (note: Miner ID must be printed first)

## During Employee’s First Week

[ ]  Ensure the employee takes a [professional portrait](https://marketing.mst.edu/photos/portraits/) (aka headshot) for the department website, if applicable; consider guiding them to the portrait location due to it being off campus.

[ ]  Order [business cards](https://printingmail.mst.edu/ordercards/) (if applicable).

[ ]  Schedule and conduct regular one-on-one meetings with supervisor.

[ ]  One card holder? [ ]  Yes [ ]  No

* If yes, employee completes additional [percipio training](https://share.percipio.com/cd/yKE-dSAmC) entitled One Card Policy and Procedures with >=80% score. Then, employee, or delegate, fills out electronic PeopleSoft One Card [Application form](https://www.umsystem.edu/ums/fa/procurement/card/one_card)

[ ]  Update department website (and other sites as applicable)

## Resources

* [Sample Welcome Emails to New Employees](https://hr.mst.edu/media/administrative/hr/prex2fonboarding/Sample%20Welcome%20Emails%20to%20New%20Employees.docx)
* [Onboarding Agenda Guidance and Template](https://hr.mst.edu/media/administrative/hr/prex2fonboarding/Onboarding%20Agenda%20Guidance%20and%20Template%206.27.25.docx)
* [Supervisor Resources](https://hr.mst.edu/media/administrative/hr/prex2fonboarding/Supervisor%20Resources%20-%20Additional%20Onboarding%20Resource%20v.%2006.27.25.docx)
* [New Employee Checklist for Success](https://hr.mst.edu/resources/getting-started/)

# Appendix

## Operational References

* PeopleSoft Finance (FSPRD) System – Access Request [Form](https://accounting.mst.edu/forms/)
	+ Note: FIN Authorization needed to view
* PeopleSoft Human Resources (HRPD) – Access Request [Form](https://hr.mst.edu/media/administrative/hr/peoplesoftaccessrequestforms/PeopleSoft%20Security%20Access%20Form.pdf#171025085121) and [Instructions](https://hr.mst.edu/media/administrative/hr/peoplesoftaccessrequestforms/Security%20Access%20Form%20Instructions.pdf#171025085121)
* JoeSS – [Resources](https://registrar.mst.edu/psinfo/)
	+ [[FERPA](https://registrar.mst.edu/psinfo/)](https://registrar.mst.edu/joess/staffjoessaccess/)
* Perceptive Content – [IT Ticket](https://tdx.umsystem.edu/TDClient/48/Portal/Home/)
* Workday – [Training](https://www.umsystem.edu/ums/fa/finance-support-center/budget-and-planning-system) and [Form](https://accounting.mst.edu/budget/)
* Cognos – [Training](https://accounting.mst.edu/media/administrative/accounting/documents/Cognos%20Analytic%20Basics.pdf#220511015247) and [Form](https://accounting.mst.edu/budget/)
* Missouri Contract Portal – [Information](https://accounting.mst.edu/contracts/) and [Access](https://muop-applications.missouri.edu/contracts/#!home)
* [Business Intelligence](https://bi.mst.edu/) / [App of Apps](https://bi.mst.edu/appinisights/) – /[Training/Resources](https://bi.mst.edu/training/)
* Canvas – [Training and Access Request](https://cafe.mst.edu/teaching/teachingtools/)
* Terminalfour (T4) Site Manager – [Training and Access Request](https://marketing.mst.edu/web/support/)
* MinerLink – [Information](https://my.mst.edu/task/all/explore-minerlink)
* Slate – Access Request [Form](https://connect.mst.edu/register/slaterequestform)
* Enterprise Rental Car – Billing Account [Application](https://www.umsystem.edu/ums/fa/procurement/carrental)