# 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)