

CUSTOMIZABLE ONBOARDING CHECKLIST SUPERVISING REMOTE EMPLOYEES

INSTRUCTIONS

Use the checklist templates as a **GUIDELINE** and customize for your specific needs

- ✓ Add, remove, or alter bullet points considering the employee's specific role
- ✓ Only include the items that are essential for before they arrive, during their first day, weeks, etc. (don't overwhelm them)
- ✓ Hold down the "Ctrl" key and click on any hyperlinks ([example](#)) to access the linked resource
- ✓ Consider customizing this checklist **before** an opening appears to be prepared when a job needs filled
- ✓ Save your customized copy of this document to ensure a smooth onboarding process and revisit on a yearly basis to ensure information is still accurate

Do you have an employee who will be working onsite? Consider customizing the [Onsite/Hybrid Employee Checklist](#) instead.

PRE-ARRIVAL (BEFORE THEIR FIRST DAY)

ENGAGE EARLY TO WELCOME

- ☐ Reach out as soon as the offer is accepted to share how excited you are that they're joining the team
- ☐ Confirm start date and time
- ☐ Consider sending a "[team newsletter](#)" to introduce your team and the culture
- ☐ Assemble a welcome packet– this could be virtual, or a physical package mailed to the employee's home
 - ☐ Items to send many include things like a copy of job description, contact names and phone lists, information on your unit/school, departmental swag, etc.
- ☐ Share the best way to get in contact with you if they have any questions
- ☐ Other:

TECHNOLOGY ACCESS AND RELATED TO-DO'S

- ☐ Discuss technology requirements (e.g., laptop, webcam, headset, internet reliability, etc.) and order any necessary equipment (see [ITS FAQ sheet](#) for more information on how to order, shipping info, etc.)
- ☐ Communicate when and how they should expect to receive their equipment (and keep them updated)
- ☐ Contact ITS (304-293-4444) or your local IT support team to have systems, such as network drives, set up in advance
- ☐ Receive login credentials from Shared Services (this message is sent after processing for payroll)
- ☐ Other:

WAYS TO SOCIALIZE

- ☐ Give your current team a heads up using the [Welcome to Our Team Template](#)
- ☐ Copy the new employee on relevant upcoming events or messages applicable to their position
- ☐ Consider selecting a mentor (**Tip!** Keep a list of employees who are interested in having a mentee)
- ☐ Have the team autograph a welcome card to mail to the employee, send a [virtual welcome card](#), or consider posting a "welcome to the team" announcement on your department's social media page or website
- ☐ Consider scheduling a team meeting for introductions for the new employee's first day (ask in advance for folks to have cameras turned on)
- ☐ Other:

SCHEDULING MUST HAVES

- ☐ Create the first week schedule (first-day assignment, key meetings, etc.) and send a drafted agenda before their start date
- ☐ Put a reminder on your calendar for the new employee's first day, and their one-year work-aversary
- ☐ Start filling out the [Employee Success Profile](#)
- ☐ Other:

FIRST DAY

WAYS TO SOCIALIZE

- ☐ Make it a priority greet the employee with enthusiasm on the first day
- ☐ Have them complete the optional "[Tell Us About Yourself](#)" form
- ☐ Set up recurring 1-1 meetings for you and the new employee (weekly is a good place to start)
- ☐ Show an interest! Ask what is meaningful to them (daycare options, upcoming athletic events, etc.)
- ☐ Other:

TECHNOLOGY ACCESS AND RELATED TO-DO'S

- ☐ Work with your employee to coordinate a pickup for their equipment (see [ITS FAQ sheet](#) for more information)
- ☐ Have employee visit login.wvu.edu to claim account and enroll in [Duo two-factor authentication](#)
- ☐ Introduce the [Portal](#) and other relevant platforms/sites
 - ☐ ITS service page, including the [service catalog](#) and [knowledge base](#)
 - ☐ Access to [VPN](#) (Virtual Private Network called Global Protect)
 - ☐ Other:
- ☐ Ask about their comfort levels with platforms your team commonly uses, such as Microsoft Teams, Outlook, SharePoint, Zoom, OneDrive, etc. (and provide resources for any gaps that you may find)
- ☐ Discuss what the [Shared Service Center](#) is and what they do
- ☐ Explain where to go to access [an ID card](#) (if applicable)
- ☐ Other:

DISCUSS SCHEDULE, JOB DUTIES AND RELATED

- ☐ Clarify the first week's schedule and review the hours of work
- ☐ Build in time for the employee to work independently (avoiding zoom/teams fatigue)
- ☐ Cover things that may be overlooked such as, "*what happens if I need to go to the bathroom?*" on a virtual call
- ☐ Ask them to complete to the [Virtual New Mountaineer Orientation](#) (if they haven't done so already)
- ☐ Make sure the employee takes a lunch break (discuss the importance of taking breaks throughout the day)
- ☐ Discuss your management style and expectations
- ☐ Explain the work of your unit– its purpose, organizational structure and goals
- ☐ Show an org chart and explain levels of supervision in the unit
- ☐ Other:

POLICIES AND PROCEDURES TO COVER

- ☐ Explain expectations for customer care
- ☐ Discuss dress code expectations if applicable (e.g., if on a video call with a customer)
- ☐ Confirm they finished processing for Payroll and required Benefits
- ☐ Discuss how and when to clock in and out (meal breaks, etc.)
- ☐ Other:

CREATE A FUNCTIONAL AND HEALTHY WORK ENVIRONMENT

- ☐ Explain how the employee can get additional office supplies
- ☐ Talk about the importance of having a set workspace and practical ways to minimal distractions (e.g., do they need access to a headset? Would they be more comfortable using a virtual background?)

- ☐ Emphasize the importance of getting up and moving for 5-10 minutes every few hours (and not sitting in front of a computer screen for 8+ hours straight)
- ☐ Be intentional with checking in - at the end of the day, ask them “***What do you need from me? How can I help?***”
- ☐ Other:

FIRST WEEKS TO DAY 30

WAYS TO SOCIALIZE

- ☐ Direct new employees to:
 - ☐ [E-News](#): Provides a daily update on important WVU news and events
 - ☐ [Go Beyond](#): Our internal recognition portal; walk them through how to use it, and why it's important (even consider sending them a “welcome to the team” eCard)
 - ☐ [Branding](#): If they will be using the WVU brand, refer them to the branding toolkit
 - ☐ [Staff Tuition Assistance Program](#): We invest in employees
 - ☐ [Campus Conversations](#): We are transparent and empower employees
- ☐ Review/set up meetings with team members or helpful contacts at the university
- ☐ Add to applicable listservs, email groups, Microsoft Teams or other departmental messaging tools
- ☐ Are there any acronyms your team commonly uses? Make a list and share what each term means
- ☐ Other

TECHNOLOGY, ACCESS AND RELATED

- ☐ Confirm the employee has fully functioning computer with access to all necessary systems
- ☐ Introduce Office 365 (office365.wvu.edu), and make sure employee has it installed on their computer
- ☐ Help install optional software from the Software Center (Self Service on Mac) or have local IT staff do this
- ☐ Does your employee require a [PCard](#) or business cards? Order if applicable
- ☐ Other:

SCHEDULE, JOB DUTIES AND RELATED

- ☐ Review the job description and outline duties and expectations
- ☐ Describe how this job fits in the department and contributes to the unit/college/division and to WVU
- ☐ Discuss individual goals and objectives — remember to be specific and realistic
- ☐ Give employee their initial assignments (make it achievable)
- ☐ Confirm any required and recommended training
 - ☐ Title IX?
 - ☐ Children on Campus?
 - ☐ Safety?
 - ☐ Other:
- ☐ Share the [WVU Employee Handbooks](#)
- ☐ Discuss [Values and Code of Conduct](#)
- ☐ Discuss the [WVU Culture Survey](#) and how we strive to improve the working environment
- ☐ Emphasize our [WVU traditions](#) and explain what a land-grant institution is
- ☐ Debrief with employee after initial meetings, trainings on initial assignment(s); also, touch base quickly each day
- ☐ Other:

POLICIES AND PROCEDURES

- ☐ Explain policies and procedures for overtime (for hourly employees), annual and sick leave accruals and proper use, holidays, etc.
- ☐ Explain how to request leave and properly report off from work (is it okay to text or do you need to call?)

- ☐ Explain consequences of taking time not earned off (taken off payroll, discipline, etc.)
- ☐ Explain Compensatory Time Off (CTO)
- ☐ Provide copies of relevant policies for your unit (e.g., absenteeism)
- ☐ Review the policy on cell phone use/personal calls
- ☐ Other:

PERFORMANCE MANAGEMENT

- ☐ Begin the practice of providing ongoing performance feedback – *remember that performance discussions should occur on a regular basis and NOT just during annual performance reviews*
- ☐ Focus on measuring outcomes (the position, not the person), discuss with individual team members, including your new employee, what is working or not working for them and/or their clients/stakeholders
- ☐ Utilize open-ended questions to allow for ongoing conversation (see [30- Day Check-in Questions](#))
- ☐ Set 30-day priorities
- ☐ Encourage them to ask for feedback and voice questions
- ☐ Review the process of the probationary period and schedule the probationary review on both of your calendars
- ☐ Discuss the importance of performance and its impact on receiving merit increase
- ☐ Explain the annual performance review and goal-setting process – *be honest and realistic with expectations set*
- ☐ “Tell a story” with specific examples of expectations you have for the employee — *remember that you can’t expect the desired behavior unless you are setting clear expectations*
- ☐ Give specific examples of how their everyday work impacts our students
- ☐ Talk about performance elements and descriptors — *describe which are most important to their job and provide a link to or copy of these documents, specifically the performance review form*
- ☐ Other: