|  |
| --- |
| **ACTIVITY** |
| **Pre-boarding** |
| Partner with Recruiting to determine new hire’s start date and arrival time | 🞎 |
| Reach out to new hire before first day to welcome them, provide start date details, and answer questions (provide basic overview of first day) | 🞎 |
| Create access.caltech credentials and email | 🗹 Completed by IMSS |
| Submit IMSS ticket for computer access to be mirrored (include UID) | 🞎 |
| Contact IMSS for server and shared drive access | 🞎 |
| Contact Procurement for P-Card and TechMart access | 🞎 |
| Identify colleagues best equipped to train, welcome, and integrate new hire | 🞎 |
| Create onboarding schedule; schedule and send calendar invitations for meetings; establish ongoing 1:1 meetings | 🞎 |
| Assign mentor/buddy | 🞎 |
| Add new hire to any relevant email distribution lists and messaging platforms | 🞎 |
| Submit request for ID card | 🗹 Completed by Recruiting |
| Contact Security if building access is required | 🞎 |
| Order keys (if necessary) from key shop | 🞎 |
| Set up workspace | 🞎 |
| Set up phone | 🞎 |
| Set up printer/copier access | 🞎 |
| Update website/phone list | 🞎 |
| Order business cards | 🞎 |
| Send email announcement to team | 🞎 |
| **Onboarding** |
| Begin@Caltech orientation with HR | 🗹 Invitation sent by Recruiting |
| Define expectations and review schedule for first week  | 🞎 |
| Confirm technology needs are met | 🞎 |
| Describe job description, role, and responsibilities | 🞎 |
| Provide department or division organizational chart | 🞎 |
| Schedule a lunch/coffee/meeting to introduce the team | 🞎 |
| Assign training materials | 🞎 |
| Benefits Orientation (if eligible) | 🗹 Invitation sent by Benefits Department |
| Introduce to Payroll Activity Monitor (PAM) for Kronos training | 🞎 |
| HR Connect (a monthly orientation hosted by HR for new hires to become familiar with campus resources, vendors, and more) | 🗹 Invitation sent by Recruiting |
| Assign first project (allow time for mistakes or frequent check-ins) | 🞎 |
| Provide and solicit feedback; ensure workload is manageable | 🞎 |
| Communicate expectations for first 30, 60, and 90 days | 🞎 |
| Introduce employee to key contacts across campus | 🞎 |
| Include employee in meetings/events across campus that introduce them to Caltech culture | 🞎 |
| Review training progress; solicit feedback from others; address any concerns (consult with EOD if necessary) in advance of introductory period end date | 🞎 |
| Discuss ongoing training opportunities | 🞎 |
| Allow employee to lead a project, if appropriate | 🞎 |
| Introduce employee to any developmental or networking opportunities | 🞎 |
| Review performance; assess areas of strength and areas for improvement | 🞎 |