**Supervisor’s Onboarding Guide**

**Office of Student Life**

*New Employee Name, Job Title*

*Department Name*

Employee Email:

Campus Address:

Employee Office Phone:

Employee Start Date:

**Mission**

With students at the center of all we do, the Office of Student Life promotes and facilitates a meaningful experience that enhances success, lifelong learning, and personal growth.

**Vision**

We will become the premier Office of Student Life with innovative practices to cultivate a caring, engaging, healthy, safe, and inclusive community.

﻿**Values**

* External: Learning, Respect, Wellness, Diversity, Equity, and Inclusion
* Internal: Student Centered, Excellence, Trust, Teamwork

**Supervisor Completes Pre-Arrival**

* Employees new or returning to IU should create an Outlook exchange email account once their UID has been activated upon approval of the hire e-doc: <https://kb.iu.edu/d/achn>
* Once the new employee has a username and UID, use the following link to request assistance with network and software access for new employees: <https://studentlife.indiana.edu/staff-resources/hiring-resources/index.html>
  + **Don’t forget to submit a request for phone service to Telecom directly**. <https://telecom.iu.edu/request>
  + Employee to complete Acceptable use agreement: <https://protect.iu.edu/online-safety/acceptable-use.html>
  + Employee to complete Emergency 911 Acknowledgment Statement <https://one.iu.edu/task/iu/e911>
  + Set up Duo Two-Step Log-in <https://kb.iu.edu/d/aluu>
* **Contact** [**dsaits@indiana.edu**](mailto:dsaits@indiana.edu) **as soon as you have the employee’s username to schedule first-day computer/phone setup**
* Office key/code/key card access (Each building will have their own contact)
* Update and distribute phone extension lists
* Create a first week schedule (see page 4 for sample)
* To order business cards and nametags, submit a Purchase Request through the Purchase Order portal on the Office of Student Life Staff Resources website: <https://studentlife.indiana.edu/staff-resources/financial-resources/index.html>
* Email parking information to employee so that they can purchase a parking permit. Give employee directions to Parking Operations office and nearest parking lot.
* Arrange for basic office supplies to be provided and for office and/or desk to be cleaned.
* Update and distribute department organizational chart and OSL organizational chart
* Inform employee of office dress code
* Assistant Director positions and higher please schedule lunch introduction meetings with Lamar, Brian, Kathy and/or Kelly and/or Vicka\* as appropriate for the position. Contact Suzann Westerfield ([sleaster@iu.edu)](mailto:sleaster@iu.edu) to schedule the lunch with Lamar, Brian, Kathy, or Vicka\* and Amy Denekamp ([adenecam@indiana.edu](mailto:adenecam@indiana.edu)) to schedule the lunch with Kelly.

**First Day Training**

* Send welcome e-mail and arrive in the office prior to the employee
* Provide the employee a copy of the Department manual
* Office/building tour, including safety information
* Provide employee with office key(s)/code/keycard access
* Review office absence call-in policy and work-from-home policy (for exempt employees)
* Review telephone procedures, mail procedures and basic operation of equipment (e.g. copy machine)
* IT computer and phone setup
* <https://uits.iu.edu/staffguide>
* [One.iu.edu review](https://kb.iu.edu/d/bdqb.) (include Employee Center, Direct Deposit setup, ePTO for PA staff, TIME for Support Staff/part-time staff)
  + Show SS/part-time staff how to use the TIME system and review guidelines: <https://fms.iu.edu/payroll/kuali-time/>
  + Review ePTO procedures and guidelines with PA employees: <http://www.iu.edu/~uhrs/hrms/ePTO/index.html>
* Give employee information about where to obtain [Crimson Card](https://crimsoncard.iu.edu/) ID
* Provide [New Employee Orientation schedule information](http://hr.iu.edu/employment/bloomington/orientation.html)
* Provide OSL and Department Org Charts to employee
* Introductions with supervisor, direct report employees (if applicable) and coworkers in immediate office
* Employee to present identification documents (if applicable) to complete part 2 of the I-9 form to either Monica Flake ([mkflake@indiana.edu](mailto:mkflake@indiana.edu)) located in the IU Student Health Center, or HR representative.
* Review role descriptor and internal position description.
* Make clear who the new employee can ask for assistance

**First Week**

* Review Office of Student Life mission and organizational chart, review Lamar, Brian, Kathy, Kelly, and Vicka’s roles
  + Assistant Director and higher positions should have introduction lunches with Lamar, Brian, Kathy and/or Kelly and/or Vicka as appropriate.
* Schedule 1:1 meetings with direct reports (if applicable) and supervisor
* Forward any standing meetings, e.g. staff meetings, 1:1 meetings
* Set up introduction meetings with other coworkers in the office to give the new hire time to learn about the organization from different perspectives and to create relationships with key staff.
* Grant employee necessary calendar permissions (as applicable to their position) to view the calendars of others and/or schedule meetings on behalf of others.
* [Submit a Marketing Request form](https://studentlife.indiana.edu/staff-resources/student-affairs-marketing/index.html) on the Office of Student Life Staff Resources webpage to add employee to the staff directory. Please make sure to also include their internal job title.
* Assist the employee in signing up for the below mandatory [trainings](https://expand.iu.edu/browse/e-training) as applicable to the position. Contact Sarah Marvell ([smarvell@iu.edu](mailto:smarvell@iu.edu)) for assistance in identifying any further trainings the employee may need for systems access specific to the position or adding employees to the Canvas course.
  + [Campus Security Authority (CSA) Training](https://expand.iu.edu/browse/e-training/courses/csa)
  + [Sexual Misconduct Policies, Processes & Resources Training](https://expand.iu.edu/browse/e-training/courses/sexual-misconduct)
  + [Data Protection & Privacy Tutorial](https://expand.iu.edu/browse/e-training/courses/data-protection-and-privacy-tutorial)
  + [Family Education Rights & Privacy Act (FERPA) Tutorial-](https://ferpa.iu.edu/ferpa/index.php) *Mandatory prior to accessing student data, must be revalidated every two years*.
  + [HIPAA Privacy & Security Training](https://expand.iu.edu/browse/e-training/courses/hipaa)-*Mandatory for Health Center/CAPS personnel*
  + [Embracing a Culture of Respect*-*Division of Student Affairs](https://iu.instructure.com/courses/2028619)*-* Canvas course. *\*This course will be updated soon\**
  + [Legal Training for Supervisors](https://iu.instructure.com/courses/2143237)- required for ALL supervisors, must complete zoom module as well.

**Second Week**

* Make sure employee has attended or is scheduled to attend a new employee orientation session
* Make sure weekly 1:1 meetings are set up with employee and supervisor, employee and direct reports (if applicable)

**First Month**

* Review major job duties and performance standards
* Identify suggested professional development activities for the employee

**60 days**

* Complete new employee performance review (for **new** to IU **support/service staff** and **promoted/demoted/transferred** AFSCME employees). Sarah Marvell ([smarvell@iu.edu](mailto:smarvell@iu.edu)) will provide you with the form approximately two weeks in advance of its due date for your convenience. If you anticipate any problems with the employee satisfactorily completing the evaluation period, contact her immediately to discuss. Once the supervisor and employee have signed, please send the form to [oslhr@iu.edu](mailto:oslhr@iu.edu)

**120 days**

* Complete new AFSCME Service staff employee review (if applicable)

**6 Months**

* Complete new employee performance review (for **new** professional staff employees)

**Sample Onboarding Schedule:**

***Expand and add as needed to cover the employee’s first 1-2 weeks***

***Date***  *Day 1*

|  |  |  |
| --- | --- | --- |
| **WHEN** | **WHAT** | **WHO** |
| 9:00 – 10:30 | Welcome & Tour | Direct Supervisor |
| 10:30 – 11:30 | Technology Set-Up | Division IT |
| 11:30 – 1:00 | Lunch | Direct Supervisor |
| 1:00 – 1:30 | Crimson Card Office | Direct Supervisor or coworker |
| 1:30 – 2:30 | Orientation Meeting | Department Staff |
| 2:30-3:00 | Complete Part 2 of I-9 | Payroll Coordinator |
| 3:00-4:00 | Introduction Meeting | Direct report name |
| 4:00-5:00 | Introduction Meeting | Director name |
|  |  |  |
| *Date: Day 2* |  |  |
| **WHEN** | **WHAT** | **WHO** |
| 9:00 – 10:30 | Register for Training Module | Direct Supervisor |
| 10:30 – 11:30 | Introduction Meeting | Coworker name |
| 11:30 – 1:00 | Lunch | Lunch with AVP |
| 1:00 – 1:30 | Training | Online training module |
| 1:30 – 3:00 | Staff Meeting | Department staff |
| 3:00-4:00 | Introduction meeting | Coworker name |
| 4:00-5:00 | Job shadowing | Coworker name |