# PRE-ONBOARD: Preparing for arrival

| **The following is a checklist of tasks to accomplish prior to the new employee’s start date:** |
| --- |
| **Status** | **To Do** | **Notes** |
| **Hiring Manager or Designee**  |
|  | The HR Analyst should reach out to the candidate to inform them of the required pre-employment meeting with the hiring manager and HR Analyst.Need more information on the pre-employment meeting? Be sure to visit our [Pre-Employment Meeting](https://moodle.lsu.edu/course/view.php?id=11554#section-2) webpage.  | **All employees must have a completed Section 1 and Section 2 of their Form I-9 prior to their hire date.** If this is not complete, then the employee may not begin work.During this meeting, ensure the employee will have the necessary resources to complete [Workday onboarding tasks](https://lsumail2.sharepoint.com/sites/Team-LSUHRM-HRM/Shared%20Documents/Forms/AllItems.aspx?id=%2Fsites%2FTeam%2DLSUHRM%2DHRM%2FShared%20Documents%2FDigital%20Resource%20Library%20files%2FOnboarding%20Checklist%20and%20Instructions%2Epdf&parent=%2Fsites%2FTeam%2DLSUHRM%2DHRM%2FShared%20Documents%2FDigital%20Resource%20Library%20files&p=true&ga=1). **If the Form I-9 cannot be completed prior to the hire date, please contact** [**HRM Talent Acquisition**](https://www.lsu.edu/hrm/talent/index.php) **as soon as possible, as the hire date must be delayed.** |
|  | Send a [welcome email](https://www.lsu.edu/hrm/employee_resources/preonboarding.php) to the new employee providing information, such as where to park on their first day, office building location, start time, confirm receipt of Benefits and Retirement Orientation, etc. | Email invitation for [Benefits and Retirement Orientation](https://www.lsu.edu/hrm/employee_resources/orientation.php) contains instructions for parking, date, and location of orientation. Please note that an employee must be in Hire status and benefits eligible to receive the invitation.  |
|   | Ensure employee’s area is cleaned, organized, and set up with necessary equipment (desk, chair, phone, computer, pens, paper, post its, etc.)  | If new machinery or equipment is required, please contact the relevant department representative, such as the department’s Business Manager.Request Computer Station Set up by contacting departmental IT, if not already done.Request Ethernet port activation by completing [PCR-360](https://pcr360.lsu.edu/cc/index/index/), if not already done. |
|  | Ensure the employee’s workspace will provide a warm welcome and has the necessary equipment. The following are **suggestions** and do not exclude the necessary equipment or resources needed for the employee to successfully complete the job: * A welcome card from Department Head/Dean, Hiring Manager, and/or the team.
* College/ Departmental/ LSU swag.
* If time and budget allow, decorate their workspace with items such as balloons and/or department/LSU swag (notebook, polo, pens, cup, etc.).
 |  |
|  | Create a [welcome schedule](https://www.lsu.edu/hrm/employee_resources/preonboarding.php). |  |
|  | Inform team and/or office of new employee and their start date by sending a [welcome email to the office](https://www.lsu.edu/hrm/employee_resources/preonboarding.php). | Ensure they are added to organizational chart, phone list, and website, etc. |
|  | Order name plate. |  |
|  | Order name tag. |  |
|  | [Request phone number](https://itservice.lsu.edu/TDClient/30/Portal/Requests/ServiceCatalog?CategoryID=149). |  |
| **Business Manager** |
|   | \*Request Microsoft Teams phone, if one is not available. |  |
|  | \*Order headset, if needed and one is not available. |  |

\*AS900 required if currently in a purchasing freeze

# First week

| First Day  |
| --- |
| Status | To Do |
| Getting Acclimated  |
|  | Provide the new team member with an office/building tour and introduce to colleagues. (Point out high traffic locations such as conference rooms, water fountains, elevators, vending machines, bathrooms, supply room, kitchen, lactation space, if necessary and if building is equipped with one, etc.) |
|  | If team member is new to LSU, consider a tour of campus highlighting areas to eat close to campus, where to park, Memorial Tower, Parade Grounds, LSUPD, Tiger Stadium, Mike the Tiger, Barnes and Noble Bookstore, Student Union, etc.  |
|  | Introduce employee to [Building Coordinator](https://lsu.edu/fs/employees/building-coordinator-information.php) and explain their role (keys and building access).  |
|  | Introduce to building custodians and explain role (cleaning and recycling). |
|  | Consider scheduling a team lunch to help the new team member connect with those they will be working with closely. The goal is for the new employee to meet colleagues and team members, making them feel welcomed and part of the team.If the welcome lunch is happening later, ensure the new team member knows what to expect for lunch on their first day in advance. |
|  | Share the [welcome schedule](https://www.lsu.edu/hrm/employee_resources/preonboarding.php) with the new team member and any others who will be involved in the process. |
|  | Building strong relationships with a new team member can provide valuable insights into their needs and preferences, helping you support their success and integration into the team. Here are some questions to ask to better understand them:* Do you have any hobbies?
* What do you like to do in your spare time?
* What type of work environment helps you perform at your best?
* Do you prefer to work individually or as a team?
* More extraverted or introverted?
* Have you done Myers-Briggs or DiSC assessment? If so, what is your style?
* How do you tend to handle conflict at work?
* Preferences on:
	+ Recognition
	+ Development
	+ Communication (email/phone/Teams) and personal (text or call)
 |
|  | If office space requires swipe access or keys, ensure employee receives access to the office space. (Tiger Card 16-digit number may be required to be provided to Building Coordinator for swipe access).  |

| Remainder of First Week  |
| --- |
| Status | To Do |
| Build Relationships |
|  | If the new team member is supervising others, schedule meetings for the new employee to meet with each team member. |
|  | Provide information such as, [Employee Identity Caucuses](https://www.lsu.edu/engagement/resources/caucuses.php) (Black; LatinX; LGBTQ+, Asian & Asian American Pacific Islander; Disability), Staff Senate, and Faculty Senate. |
| Provide Safety Resources  |
|  | Inform about [emergency text messaging system](https://www.lsu.edu/oep/prepare/index.php), LSU Mobile App, and [LSU Shield App](https://www.lsu.edu/police/safety/shield.php). Share information related to the University’s ‘[Run. Hide. Fight](https://www.ncbrt.lsu.edu/Courses/dhs/PER-375.php)’ plan.Watch a brief video on [Run, Hide, Fight from the Louisiana Board of Regents](https://nam04.safelinks.protection.outlook.com/?url=https%3A%2F%2Flsu-campaigns.omniupdate.com%2Ft%2Fd-l-vjkkic-jdkyddghh-r%2F&data=05%7C01%7Cachenevert1%40lsu.edu%7C144762f3c4d0414fe2a708dba2895a41%7C2d4dad3f50ae47d983a09ae2b1f466f8%7C0%7C0%7C638282483025719844%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=u1hpDMkbSVWzVwm0WcRE6wvyo%2BKFehi5jjn9NWpFa80%3D&reserved=0).Watch a related video from [the Department of Homeland Security](https://nam04.safelinks.protection.outlook.com/?url=https%3A%2F%2Flsu-campaigns.omniupdate.com%2Ft%2Fd-l-vjkkic-jdkyddghh-y%2F&data=05%7C01%7Cachenevert1%40lsu.edu%7C144762f3c4d0414fe2a708dba2895a41%7C2d4dad3f50ae47d983a09ae2b1f466f8%7C0%7C0%7C638282483025719844%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=pdV%2Ba9VnxI4bIo32bWLH6tiS4hE1f%2F4sL6EhVe0IdEo%3D&reserved=0).More about the Department of Homeland Security’s “[Run, Hide, Fight](https://nam04.safelinks.protection.outlook.com/?url=https%3A%2F%2Flsu-campaigns.omniupdate.com%2Ft%2Fd-l-vjkkic-jdkyddghh-j%2F&data=05%7C01%7Cachenevert1%40lsu.edu%7C144762f3c4d0414fe2a708dba2895a41%7C2d4dad3f50ae47d983a09ae2b1f466f8%7C0%7C0%7C638282483025719844%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=eDO6IWWb1%2FHSgdh1uSfifC5d9G2bo10Udu5OG7YRcvk%3D&reserved=0)” paradigm.More information on [the Office of Emergency Preparedness](https://www.lsu.edu/oep/). |
|  | Discuss plan of evacuation and alternative exits in case of an emergency within the office. |
| Critical Actions  |
|  | Ensure new team member registers for LaCarte card, if applicable. (Employee will need to take the LaCarte card training and submit the [LaCarte card registration form](https://www.lsu.edu/administration/ofa/oas/acctpay/lacarte.php)).  |
|  | Add new team member to any weekly/monthly meetings, departmental website directory, special accounts, Microsoft Teams/Slack chats, if applicable, and share calendars (supervisor to new employee, new employee to supervisor, new employee and team members).  |
|  | Ensure team member has completed Workday onboarding tasks. |
|  | Provide job description and employee work agreement.  |
|  | Inform of Multi-Factor Authentication/Single Sign On and how to access files from home (authentication).  |
|  | Discuss office policies (work hours, lunch, breaks, dress code, ordering supplies, [time entry/clocking in and out](https://moodle.lsu.edu/course/view.php?id=11554#section-8), [requesting time off](https://moodle.lsu.edu/course/view.php?id=11554#section-8)). |
| Check-in  |
|  | Check in with the new team member at the end of their first day and again at the end of the week to see how their experience has been. During these check-ins, review the schedule for the upcoming week so they know what to expect before returning to work. Ask if they have any questions or need additional support to be successful. While you can tailor questions to the situation, the following are recommended to gain insight into the employee’s experience:* How has your first week been?
* Anything that surprised or confused you?
* Do you feel connected or disconnected to the team? In what way?
* Is there anything you’d like more information or resources on?
* Do you have the information you need to complete your tasks?
* What can I do to make sure the next 2 weeks are successful for you?
 |
| Resources  |
|  | Provide [AP & Travel Brochure](https://www.lsu.edu/administration/ofa/oas/acctpay/index.php), if applicable. |
|  | Encourage new team member to follow LSU and department on social media platforms (Instagram, Facebook, and X). |
|  | Request access to Workday via Workday Security Access Request in myLSU > Financial Resources.  |
|  | Request access to any specific departmental systems.  |
|  | Provide access to secondary email accounts, if applicable.  |
|  | Ensure or inform about the following computer and telephone procedures: * Copier/printer/scanner
* Microsoft Teams (making phone calls)
* Default printer on PC
* Computer log off at the end of each day for university updates
 |
|  | Ask new team member if they have any questions regarding orientation topics (benefits (including tuition exemption, Employee Assistance Program, health insurance, retirement, employee perks, and onboarding tasks). |

# First 30 days

|  30 Days |
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| Status | To Do |
| Critical Actions |
|  | Ensure new team member has selected their benefit elections in Workday and submitted all necessary forms.  |
|  | La R.S. Title 17:3311 (A)(3) requires that any Academic, Research Associate and Professional employees who earn leave must certify their leave monthly. Ensure new team member has acknowledged [Leave Certification in Workday](https://www.lsu.edu/hrm/time_and_absence/leave_certification_requirement.php) (leave eligible employees). |
|  | Conduct [Planning Session](https://lsu.edu/hrm/training_org_development/odcm/performance_management.php) to discuss responsibilities, goals, and explain how their position fits into the University’s mission and vision and department’s strategic plan. |
|  | If employee has an office phone number, [order business cards](https://itservice.lsu.edu/TDClient/30/Portal/Requests/ServiceCatalog?CategoryID=149). *AS900 required if currently in a purchasing freeze.* |
| Training & Development |
|  | Notify the new team member about the annual [mandatory annual trainings](https://lsu.edu/hrm/training_org_development/mandatory_employee_training.php), which include: * \*Cybersecurity Awareness Training
* Louisiana Code of Governmental Ethics/Louisiana Board of Ethics
* Power-based Violence Prevention and Response
* Digital Resource and Content Accessibility Awareness
* \*State of Louisiana ADA Compliance Training for Supervisors (required every 3 years).

\**Must be completed within first 30 days* |
|  | Arrange for any necessary training the new employee may need to fully understand job responsibilities.  |
|  | Inform them of [career development](https://www.lsu.edu/hrm/employee_resources/career-development.php) opportunities.  |
| Check-in |
|  | Schedule a check-in meeting, if frequent [one-on-one meetings](https://lsumail2.sharepoint.com/sites/Team-LSUHRM-HRM/Shared%20Documents/Forms/AllItems.aspx?id=%2Fsites%2FTeam%2DLSUHRM%2DHRM%2FShared%20Documents%2FDigital%20Resource%20Library%20files%2FOne%2Don%2Done%20meetings%2Epdf&parent=%2Fsites%2FTeam%2DLSUHRM%2DHRM%2FShared%20Documents%2FDigital%20Resource%20Library%20files&p=true&ga=1) are not currently scheduled. During the first 30 days, employees are still discovering some of the ins and outs of their position. As a manager, it is beneficial to allow the employee to reflect on their first 30 days. This check-in gives you time to restate expectations and better understand your employee’s strengths and weaknesses. You may ask any question(s) you see fit, but the following are recommended for managers to gain insight on the employee’s experience: * How do you feel after your first month?
* So far, is your role what you expected it to be?
* Can you identify any challenges you have experienced within your first 30 days?
* Do you feel you have the information, tools, and resources you need to do your job successfully?
* Are you feeling welcomed by the team?
* How can I further support you in your role?
* Are there any aspects of our office culture that you are particularly excited about or concerned about?
 |
| Resources |
|  | Provide new team member with organizational chart and directory.  |
|  | Consider assigning a team member within the department to serve as a mentor for the new team member. This can provide additional support throughout their career at LSU. Mentors play a key role in fostering success and building relationships within the LSU community. |
|  | Share information with new team member regarding [professional headshots](https://calendly.com/lsu-photography/studio-headshot.), taken by Office of Communication and University Relations, if working within an area that requires a headshot for the website. *AS900 required if currently in a purchasing freeze.* |
|  | Inform of any campus events or important employee updates (Fall Fest, Staff Appreciation Week, Open Enrollment, Benefits Fair, W-2s, etc.).  |
|  | Per La. R.S. 42:31, it requires all unclassified employees earning $100,000 or more annually to provide proof of a valid Louisiana driver’s license and vehicle registration in Louisiana within 30 days of being hired. If applicable to your new team member, ensure new team member has provided proof of a valid Louisiana driver’s license and, if applicable, vehicle registration in the state of Louisiana. |

# 60 days

| 60 Days |
| --- |
| Status | To Do |
| Critical Actions |
|  | Ensure new team member has selected their retirement elections in Workday and submitted all necessary forms.  |
| Check-in |
|  | Schedule a check-in meeting, if frequent [one-on-one meetings](https://lsumail2.sharepoint.com/sites/Team-LSUHRM-HRM/Shared%20Documents/Forms/AllItems.aspx?id=%2Fsites%2FTeam%2DLSUHRM%2DHRM%2FShared%20Documents%2FDigital%20Resource%20Library%20files%2FOne%2Don%2Done%20meetings%2Epdf&parent=%2Fsites%2FTeam%2DLSUHRM%2DHRM%2FShared%20Documents%2FDigital%20Resource%20Library%20files&p=true&ga=1) are not currently scheduled. The following questions are recommended when understanding your employees experience: * What is something you discovered recently that you wish you would have known sooner in your onboarding process?
* Do you have any preferences for how you would like to gain additional training and experience so you can be successful (formal classroom, hands-on, job shadowing)?
* Is there any professional development that interest you? (Including offerings on campus)
* How is your experience with the team?
* Who has been most helpful to you so far and why?
* How can I further support you in your role?
 |
| Resources |
|  | Inform of any campus events or important employee updates (Fall Fest, Staff Appreciation Week, Open Enrollment, Benefits Fair, W-2s, etc.).  |

# 90 Days

| 90 Days |
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| Status | To Do |
| Check-in |
|  | Discuss any changes to the organizational vision and strategic plans for both the university and unit. |
|  | The following questions are recommended when understanding your employees experience: * What areas/tasks/projects are you enjoying the most within your position?
* Are there any aspects of your job that you find frustrating or unfulfilling?
* Any challenges that you have faced within your time at LSU?
* Have we provided all the tools you need to be successful, and if not, what do you need?
* Are there any areas where you feel you could benefit from additional trainings or resources? So far, what trainings or resources have been most effective/beneficial?
* Is there any professional development that interest you? (Including offerings on campus)
* How can I further support you in your role?
 |
| Resources |
|  | Ensure new team member has all the tools needed to be successful in their job (supplies and/or training). |
|  | Inform of any campus events or important employee updates (Fall Fest, Staff Appreciation Week, Open Enrollment, Benefits Fair, W-2s, etc.).  |

# six months

| Six Months |
| --- |
| Status | To Do |
| Check-in  |
|  | Discuss any changes to the organizational vision and strategic plans for both the university and unit.  |
|  | Check in on job performance, work goals, and future expectations to ensure that the employee is performing at the best of their ability. The following questions are recommended when understanding your employees experience: * Are there any specific achievements you are particularly proud of?
* Do you feel your role and responsibilities are clear?
* How do you feel about your progress on the goals we set at the beginning?
* What areas/tasks/projects are you enjoying the most within your position?
* Are there any aspects of your job that you find frustrating or unfulfilling?
* What challenges have you faced in the last few months, and how have you addressed them?
* Are there any tasks or projects you feel you need more support or training on? If so, what trainings or resources have been most effective/beneficial? (Including offerings on campus)
* Do you have any preferences for how you would like to gain additional training and experience so you can be successful (formal classroom, hands-on, job shadowing)?
* Are there any skills you would like the opportunity to develop more?
* Are there any processes that can be better streamlined?
* How is your experience with the team?
* How can I further support you in your role?
 |
| Resources |
|  | Remind employee about any important campus-wide activities and ways to get involved (e.g., Employee Identity Caucuses (Black; LatinX; LGBTQ+, Asian & Asian American Pacific Islander; Disability), Staff Senate, and Faculty Senate. |
|  | Inform of any campus events or important employee updates (Fall Fest, Staff Appreciation Week, Open Enrollment, Benefits Fair, W-2s, etc.).  |

# nine months

| Nine Months |
| --- |
| Status | To Do |
| Check-in  |
|  | Discuss any changes to the organizational vision and strategic plans for both the university and unit. |
|  | Check in on job performance, work goals, and future expectations to ensure that the employee is performing at the best of their ability. The following questions are recommended when understanding your employees experience:* How satisfied are you with your job overall?
* Do you feel your role and responsibilities are clear?
* How do you feel about your progress on the goals we set at the beginning?
* What areas/tasks/projects are you enjoying the most within your position?
* Are there any aspects of your job that you find frustrating or unfulfilling?
* What challenges have you faced in the last few months, and how have you addressed them?
* Are there any skills you would like the opportunity to develop more?
* Are there any areas where you feel you could benefit from additional trainings or resources? So far, what trainings or resources have been most effective/beneficial?
* Is there any professional development that interests you? (Including offerings on campus)
* How can I further support you in your role?
 |
| Resources |
|  | Inform of any campus events or important employee updates (Fall Fest, Staff Appreciation Week, Open Enrollment, Benefits Fair, W-2s, etc.).  |

# one year

| One Year  |
| --- |
| Status | To Do |
| Check-in |
|  | Discuss any changes to the organizational vision and strategic plans for both the university and unit. |
|  | Check in on job performance, work goals, and future expectations to ensure that the employee is performing at the best of their ability. The following questions are recommended to understand your employee’s experience:* Are there any specific achievements you are particularly proud of?
* What areas/tasks/projects are you enjoying the most within your position?
* What are some elements of the position you are *not* enjoying as much?
* What challenges have you faced in the last few months, and how have you addressed them?
* Are there any skills you would like the opportunity to develop more?
* Are there any areas where you feel you could benefit from additional trainings or resources? So far, what trainings or resources has been most effective/beneficial?
* Is there any professional development that interest you? (Including offerings on campus)
* How can I further support you in your role?
* Where do you see yourself in the next year within LSU?
* What can we do to help you achieve your professional goals?
 |
|  | Assess the job description to identify any new responsibilities that should be included. |
| Build Relationships |
|  | Celebrate employee’s achievement of 1 year of service. Here are some ideas to celebrate this milestone: * Write a heartfelt note or letter expressing gratitude for their hard work and dedication.
* Acknowledge the employee’s anniversary in a team meeting or an office-wide email. Highlight their achievements and contributions.
* Decorate their desk with balloons, banners, and a card signed by the team.
* Take them to coffee or lunch.
 |
| Resources |
|  | Employee is now eligible for [tuition exemption](https://www.lsu.edu/hrm/benefits/tuition_exemption.php).  |
|  | Inform of any campus events or important employee updates (Fall Fest, Staff Appreciation Week, Open Enrollment, Benefits Fair, W-2s, etc.).  |