

SUPERVISOR CHECKLIST (DETAILED)

This checklist was developed to assist supervisors after an offer has been accepted and to ensure that all Graziadio employees have a consistent onboarding experience. The time-frame below is provided as a general guideline. Please familiarize yourself with the information provided at:

HR Supervisor Tools: <http://community.pepperdine.edu/hr/supervisor/>
Graziadio Employee Onboarding: <http://community.pepperdine.edu/graziadio/geo/>



EMPLOYEE INFORMATION

Name:	Start Date:
Office / Work Space #:	Phone #:

PRE-ARRIVAL

Timeframe	Action	Description/Notes	Contact(s)
2-4 weeks before employee's start date (Upon completion of the finalist selection to close out the position in the HR posting system)	<input type="checkbox"/> Send a copy of the Hiring Summary to Chris Bauman	Every hiring manager receives a Hiring Summary after they complete the on-line finalist selection to close out the job posting. The Hiring Summary provides details for the new hire (e.g., Start Date/Pay Rate) that is used to manage salaries at the school level.	Chris Bauman (x5524)
2-4 weeks before employee's start date	<input type="checkbox"/> Complete new hire paperwork/I-9 invitation	e.g., data form, direct deposit, W4, etc.	Direct Supervisor; HR (x4397)
2-4 weeks before employee's start date	<input type="checkbox"/> Submit request for office to be painted if needed	Check condition of office and request painting if needed. Offices are painted only at certain times per year.	Leslie Haggard (x5828) - WVGC Pam Ortega (x5677) - IGC Leslie Skinner (x1601) - EGC Harold Taylor (x5630) - WLA
2-4 weeks before employee's start date	<input type="checkbox"/> Clean office space & work station	Arrange for office carpets to be vacuumed/cleaned if needed. Clean and tidy employee's workspace: furniture, phone, and computer equipment, particularly keyboard.	Leslie Haggard (x5828) - WVGC Pam Ortega (x5677) - IGC Leslie Skinner (x1601) - EGC Harold Taylor (x5630) - WLA
2-4 weeks before employee's start date	<input type="checkbox"/> Organize office space	Evaluate existing arrangement of furniture.	Warehouse Services (x4268)
2-4 weeks before employee's start date	<input type="checkbox"/> Review computer hardware/software	Determine new hire's hardware and software needs to fully function in position.	Barron Williams (x5750)
2-4 weeks before employee's start date	<input type="checkbox"/> Equip workspace with basic office supplies	e.g., scissor, stapler, etc.	See your department's office administrator.
2-4 weeks before employee's start date	<input type="checkbox"/> Obtain office keys & parking/garage key card	Arrange for keys to be made for office doors, cabinets, etc., if not available. Obtain key card for building/parking access.	Pam Ortega (x5677)

PRE-ARRIVAL (CONTINUED)

Timeframe	Action	Description/Notes	Contact(s)
2-4 weeks before employee's start date	<input type="checkbox"/> Order business cards, if appropriate	Consult with employee: Ask how he/she would prefer to have name printed on business cards (e.g., nickname versus legal name).	Print Services (See your department requestor)
2-4 weeks before employee's start date	<input type="checkbox"/> Request mailbox	Determine where new employee's mail will reside.	See your department's office administrator
2-4 weeks before employee's start date	<input type="checkbox"/> Prepare/provide department manuals, handouts, academic catalog, and other info relative to job	Make sure all information is ready and available to give to employee on first day of employment.	Supervisor
2-4 weeks before employee's start date	<input type="radio"/> Schedule new employee orientation (NEO) in Malibu	All new regular and temporary employees should attend; temporary employees with work assignments of less than two weeks are invited, but not required, to attend orientation. Space is limited, so please ensure you have reserved a seat by the Thursday prior to Orientation. See http://community.pepperdine.edu/hr/new-employees/neo/ for available sessions.	HR (x4397)
2 weeks before employee's start date	<input type="checkbox"/> Install phone & phone service	If no phone or phone line exists, arrange for phone installation, line set-up, phone number, etc.	Luis Lara (x4173)
1 week before employee's start date	<input type="checkbox"/> Assess Kronos Approver Status	Determine if employee will approve staff Kronos records. Complete Supervisor Signature Information Form: http://community.pepperdine.edu/finance/content/forms/pay-supervisor-signature-info.pdf	Louise Sakihama (x5624)
1 week before employee's start date	<input type="checkbox"/> Obtain employee ID (CWID), network ID (NTID), and temporary password	These IDs provide system access to Wavenet and e-mail. If you do not receive an e-mail that contains this information, contact the Anytime Support Desk.	Anytime Support Desk (x4357)
1 week before employee's start date	<input type="checkbox"/> Configure hardware/install software	Set up computer and printer, and install all necessary software.	Barron Williams (x5750)
1 week before employee's start date	<input type="checkbox"/> Assess Finance access needs	Determine access needs to the finance system and budgets, purchasing and travel credit card requirements, phone allowance, etc.	Jaime Quillen (x5623)
1 week before employee's start date	<input type="checkbox"/> Assess system access needs (e.g., PeopleSoft, NOLIJ, & Hobsons)	Determine system access needs. Deborah Galuhn is the main point of contact for PeopleSoft and Michael Stamper is the main point of contact for all other system access needs.	Deborah Galuhn (x5516) and Michael Stamper (x2396)
1 week before employee's start date	<input type="checkbox"/> Assess system training needs (e.g., PeopleSoft, NOLIJ, & Hobsons)	Determine system training needs. Deborah Galuhn is the main point of contact for PeopleSoft. Michael Stamper (and the Technology Services staff) are the main points of contact for other system training needs.	Deborah Galuhn (x5516) - PeopleSoft; Michael Stamper (x2396) - Email Lists; Juan Mena (x5765) - NOLIJ; Michael Avery (x5584) - Hobsons & Apply Yourself; Roger Lotho (x5537) - OmniUpdate; Barron Williams (x5750) - GIE & P/S Drive
1 week before employee's start date	<input type="checkbox"/> E-mail/mail PeopleSoft and Finance access forms	Send all necessary access forms from discussions with Finance Office and Student Systems to new employee to complete.	Jaime Quillen (x5623)

ARRIVAL

Timeframe	Action	Description/Notes	Contact(s)
1 week before employee's start date	<input type="checkbox"/> Notify GEO team of employee's start date	The GEO team will provide Graziadio branded items to welcome your new employee. Please notify Morag or Valerie of your new employee's start date in advance, so the GEO team can provide the items by the employee's first day.	Morag Knapp (x5527) or Valerie Nowacki (x5534)
1 week before employee's start date	<input type="checkbox"/> Assign "buddy" employee	Choose an employee with good interpersonal skills who is able to answer routine questions and general concerns when you are not available.	Consult with department staff
1 week before employee's start date	<input type="checkbox"/> Prepare staff announcement	This is one of the most important ways you influence how valued your employee feels. Refer to "Staff Announcement Guidelines" at http://community.pepperdine.edu/graziadio/geo/managers/staffannouncement/ .	Valerie Nowacki (x5534)
1st Day	<input type="checkbox"/> Provide office keys and key card	Employee to sign for keys/key card. Show employee how to use key card for garage and building garage access. Explain parking garage layout and appropriate parking locations.	Supervisor
1st Day	<input type="checkbox"/> Introduce "buddy" employee	Explain role of "buddy" to new employee.	Supervisor
1st Day	<input type="checkbox"/> Send staff announcement	Refer to "Staff Announcement Guidelines" at http://community.pepperdine.edu/graziadio/geo/managers/staffannouncement/ .	Valerie Nowacki (x5534)
1st Day	<input type="checkbox"/> Tour building and introduce employee	See "Introduction & Tour" section on GEO Supervisor Quicklist at http://community.pepperdine.edu/graziadio/geo/managers/checklists/ .	Supervisor or Designate
1st Day	<input type="checkbox"/> Explain office layout	Show employee how department's offices are arranged/located, including desk drawers, cabinets, file storage, etc.	Supervisor or Designate
1st Day	<input type="checkbox"/> Assist employee with computer log in	Show employee how to log on to computer, set up Outlook, locate shared drives, access bschool Web site, Yammer, community pages, etc.	Supervisor; Barron Williams, x5750
1st Day	<input type="checkbox"/> Explain phone features to employee	Show employee how to make calls (i.e., place, answer, end, hold, transfer, etc.), set up voice-mail, and other phone features.	Supervisor; Barron Williams (x5750)
1st Day	<input type="checkbox"/> Provide information relevant to position	Provide department manuals/handouts, academic catalog, etc. See "Position Information" section on Supervisor Quicklist at http://community.pepperdine.edu/graziadio/geo/managers/checklists/ .	Supervisor
1st Day	<input type="checkbox"/> Invite employee to lunch	If supervisor is unable to join new employee for lunch on first day, arrange for buddy employee or colleague to join employee for lunch on first day.	Supervisor or Designate

ARRIVAL (CONTINUED)

Timeframe	Action	Description/Notes	Contact(s)
1st Day to 1st Week	<input type="checkbox"/> Share initial job assignments and training plan	Provide at minimum an overview of what new employee should expect first week.	Supervisor
1st Day to 1st Week	<input type="checkbox"/> Request that new hire's e-mail address is added to distribution lists.	Send an e-mail to michael.stamper@pepperdine.edu requesting him to add your new hire's e-mail address to one (or more) of the following distribution lists: (1) GSBM Staff Regional Campuses; (2) GSBM Staff Malibu; (3) GSBM Full-time Faculty; (4) GSBM Supporting Faculty	Michael Stamper (x2396)
1st Week	<input type="checkbox"/> Show employee how to log in to Wavenet and navigate the PeopleSoft system, if applicable	See "Administrative Procedures" section on GEO Supervisor Quicklist at http://community.pepperdine.edu/graziadio/geo/managers/checklists/ .	Supervisor; Deborah Galuhn (x5516)
1st Week	<input type="checkbox"/> Review University policies	See "University Policies" section on GEO Supervisor Quicklist at http://community.pepperdine.edu/graziadio/geo/managers/checklists/ .	Supervisor
1st Week	<input type="checkbox"/> Review general departmental procedures	See "Administrative Procedures" section on GEO Supervisor Quicklist at http://community.pepperdine.edu/graziadio/geo/managers/checklists/ .	Supervisor
1st Week	<input type="checkbox"/> Review job schedule and hours	See "Position Information" section on GEO Supervisor Quicklist at http://community.pepperdine.edu/graziadio/geo/managers/checklists/ .	Supervisor
1st Week	<input type="checkbox"/> Review job description, performance expectations, assessment, and success measures	See "Position Information" section on GEO Supervisor Quicklist at http://community.pepperdine.edu/graziadio/geo/managers/checklists/ .	Supervisor
1st Week	<input type="checkbox"/> Inform employee of weekly meetings and travel requirements, if applicable	Have new employee complete Driver Status form and submit completed form to the Office of Insurance & Risk.	Supervisor; Insurance & Risk (x4410)
1st Week	<input type="checkbox"/> Complete Finance training (e.g., T&E, purchasing card, reallocation, reconciliation), if applicable	Arrange for employee to have travel & entertainment and/or purchasing card	Jaime Quillen (x5623)

ARRIVAL (CONTINUED)

Timeframe	Action	Description/Notes	Contact(s)
1st Week	<input type="checkbox"/> Inform employee of cellphone usage and University telephone allowance, if applicable	Inform employee of cellphone usage and University telephone allowance, if applicable	Supervisor
2nd Week/Ongoing	<input type="checkbox"/> Review /Discuss/ Assist	Check in with buddy employee to see how well the new employee is adjusting. Meet with new employee to discuss job specific questions and general concerns.	New Employee, Buddy Employee, Department Staff
1st Month	<input type="checkbox"/> Introduce new employee to external contacts	Introduce new employee to staff and faculty at other campuses within the Graziadio School or external to Pepperdine with whom he/she will regularly work.	Supervisor
1st Month	<input type="checkbox"/> Review department's annual goals and school wide initiatives.	<input type="checkbox"/> Distinctive Leadership 2015: http://bschool.pepperdine.edu/newsroom/index.php/2009/01/welcome-in-the-renew-year/ <input type="checkbox"/> Graziadio Hallmarks: http://bschool.pepperdine.edu/experience/hallmarks/	Supervisor
1st Month	<input type="checkbox"/> Follow up on anti-harassment training	Confirm that employee has completed online sexual harassment training prevention. Pepperdine University is committed to providing a campus environment free of all forms of sexual harassment.	HR (x4397)
1st Month	<input type="checkbox"/> Review/Discuss/ Assist	See Top 10 Reminders for Supervisors at http://community.pepperdine.edu/hr/supervisor/reminders.htm	HR (x4397)
3rd Month	<input type="checkbox"/> Complete introductory Assessment Form	Complete the Introductory Assessment form online at http://community.pepperdine.edu/hr/supervisor/ . Return the completed form (including supervisory and employee signatures) to Human Resources.	HR (x4397)
Ongoing Items	<input type="checkbox"/> Encourage new employee to attend University sponsored events and professional development opportunities.	See http://community.pepperdine.edu/hr/new-employees/ and http://community.pepperdine.edu/hr/development/	HR (x4397)
End of 1st Year	<input type="checkbox"/> Complete Annual Employee Assessment Form	Regular reviews are an important part of enhancing performance and managing workplace expectations. Complete the Annual Employee Assessment form online at http://community.pepperdine.edu/hr/supervisor/ . Return the completed form (including supervisory and employee signatures) to Human Resources.	HR (x4397)
End of 2nd Year	<input type="checkbox"/> Complete the Growth and Development Exchange conversation, if applicable.	<p>The two-year anniversary has been identified as a critical time for the University to actively engage its more recent high-performing hires. This exchange is strongly encouraged for two-year employees (and is optional for all other employees at the request of either the supervisor or the employee) who have demonstrated:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Capacity for leadership and advancement opportunities <input type="checkbox"/> Loyalty in their work to the University <input type="checkbox"/> Alignment of work and personal values to the University mission <input type="checkbox"/> A desire to stay and grow within the Pepperdine community <p>To learn more, visit http://community.pepperdine.edu/hr/supervisor/performance-management/</p>	HR (x4397)

