New Employee On-Boarding Checklist

Department Actions

Prior to employee’s arrival:

☐ Inform staff of the employee’s arrival
☐ Set up and clean the new employee’s office space, order furniture as needed
☐ Obtain office supplies
☐ Establish a schedule for the first day
☐ Establish a training schedule/work plan
☐ Order an office phone & VM – call Comm Services (3-2097) to get a price quote, then submit ISR
☐ Order a cell phone (need name and BUID) https://www.bu.edu/tech/services/cccs/phone/bu-cellular-services/service/
☐ Order a computer and/or laptop and accessories (monitor(s), smart power strip, docking station, keyboard, mouse) https://www.bu.edu/tech/support/purchase/departmental/
☐ Order relevant work-related items, e.g., key, business cards, nameplates, door sign, name badge, P-card, laptop, uniforms, manuals/handbooks, and/or tools, travel mug
☐ Contact your department’s DSA to provide access to appropriate functions in BUworks; more information here http://www.bu.edu/tech/support/buworks/accessing-buworks/
☐ Establish access to appropriate computing resources and electronic files

During employee’s first week:

☐ Introduce the new employee to staff
☐ Give employee a tour of campus
☐ Review the dress code and office protocol
☐ Review vacation and sick time process
☐ For exempt employees: explain time sheet completion
☐ For non-exempt employees: explain time entry on BUworks via Employee Self-Service (ESS)
☐ Review the position description
☐ Review performance standards
☐ Review the pay schedule
☐ Confirm the work schedule
☐ Accompany him or her on a tour of the building including the lunchroom, emergency exits, and restrooms
☐ Discuss the location of the nearest T stop or parking lot
☐ Provide keys (e.g., office, building, desk, file cabinets, TGM – if applicable)
☐ Set up ID card access, if applicable (contact your department DSA)
- Provide access and instructions for fax machines, copiers, printers, etc.
- Ensure the employee has access to BU works Central and confirm they have entered their personal data and emergency contact information. Use Online Employee Tools as a reference.
- Update employee’s phone number in BU Works (ESS > Personal Info > Office Address)
- Add the employee’s name to any email group lists, distribution lists, internal/office phone lists, and/or websites (Contact Joe Salmeri and Lauren Alzate)
- Complete the Conflict of Interest Policy Statement
- Distribute relevant work-related items, e.g., business cards, nameplates, name badge, P-card, cell phone, laptop, uniforms, manuals/handbooks, and/or tools
- Review departmental and University org charts
- Schedule safety training with EH&S, if applicable
- Order and distribute personal protective equipment, if applicable (e.g. hard hat, vest, shoes)
- Schedule trainings for systems, as applicable (e.g. SAP/BUWorks, PMWeb, FMInteract, OnBase)

**Employee Actions**

**Human Resources**

- Complete the I-9 Form within first three days of employment
- Establish an email account, Kerberos password, and University Identification Number (Charles River Campus or Medical Campus) and issue a Terrier Card
- Complete Sexual Harassment & Discrimination Prevention in Terrier E-Dvelopment
- Schedule employee orientation

**Payroll**

- Complete the W-4 federal form on BUworks via ESS
- Complete the W-4 state form on BUworks via ESS
- Sign up for Direct Deposit on BUworks via ESS

**Other**

- Set up your voicemail; instructions at [https://www.bu.edu/tech/services/cccs/phone/voice-messaging/user-guide/](https://www.bu.edu/tech/services/cccs/phone/voice-messaging/user-guide/)
- Familiarize yourself with IS&T Resources at [http://www.bu.edu/tech/support/employee/](http://www.bu.edu/tech/support/employee/)