Managers Toolkit

GO TO OFF BOARDING »

GO TO ON BOARDING »

Onboarding Manager Checklist

Helping new employees connect to the [redacted] and their role, pre- arrival through the first year of employment.

This document reflects the new post-COVID process, with HR managing virtual-only onboarding and New Employee Orientation (NEO), which includes completing employee paperwork.

Managers have two primary new hire responsibilities

Technology & workspace access

Ordering computer, [redacted] network access, onsite cubicle/ office space, telephone, other system access.

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New employee role information

Team and stakeholder introductions; all information to perform role, performance management.

High-level IT Process Overview

1. HR: [redacted] email to manager; HR + [redacted] begin security clearance
2. New hire clears security and is assigned email account; info sent to manager.
3. Manager immediately submits IT request, which includes manager-confirmed employee home address.
4. Manager registers employee for a [redacted] (using [redacted] if employee may be onsite) and/or a [redacted] Hardtoken.
5. Manager or employee schedules a [redacted] appointment (if employee will be onsite)

Offer Acceptance/Pre-Arrival

HR and [redacted] process security. After new hire clears security and is issued a [redacted] email:

- [ ] Complete and submit the online New Employee IT Onboarding Request Form
- [ ] Submit [redacted] registration request
- [ ] Request cubicle/office space and name plaque [if in office 3x +] with site or [redacted] rep
- [ ] Request telephone installation: [redacted]
- [ ] Request telephone number: [redacted]
- [ ] Manager or employee schedules [redacted] appointment (if employee will be onsite)

Internal Transfer: Two weeks before

Receiving managers are responsible for opening an Employee Transfer ticket for the transferring Employee through the [redacted]

One week before

- [ ] Email to employee:
  Reconfirm start date
  Include email and network information. If not received , reach out to your HR rep.
  Ask for onboarding session schedule
  Provide onsite logistics parking, cubicle location, vehicle pass, etc. as needed
- [ ] Check with IT by clicking "check ticket status."
- [ ] If needed: Coordinate office access for first day
- [ ] If applicable: Write email announcement draft
- [ ] Assign a "buddy" to assist new hire
- [ ] Create a Welcome Aboard package:
  - Org charts
  - Job description
  - [redacted]
  - Role-specific mandatory training
  - Other mandatory training
  - Performance goals
  - Ethical Conduct and Financial Disclosure order
- [ ]

Entrance-on-Duty Day

- [ ] Distribute group/team welcome email
- [ ] Schedule meetings with key team members
- [ ] Potential to meet with new employee first day, after complete onboarding and/or [redacted]

Second Day

- [ ] Provide Welcome Aboard package:
  Org charts
  Job description
  Employee Handbook/ acronyms
  Payroll, codes, time keeping
  Bargaining unit agreement (if needed)
- [ ] Possible to meet team members
- [ ] Orient the new employee to office: Introduce buddy and/or facility safety/basic services

First Week

- [ ] Orientation meeting:
  Administrative processes overview and POCs
  Meetings/ensure updated distribution lists
  List of key contacts/ stakeholders/team members
  Review electronic files, shared doc spaces and other materials
- [ ] Set up/conduct intro meetings with stakeholders
- [ ] Ensure employee reads Standards of Conduct briefing document and written confirmation of policy guidance.
- [ ] Register new employee for [redacted] Meet and Greet meeting by email to [redacted]

Second Week

- [ ] Offer support for accessing/ registering for [redacted], [redacted] and other agency-wide systems.
- [ ] Provide the employee with list of mandatory agency training requirements and any mandatory training specific to the position.
- [ ] Remind employee to update employee profile in the employee directory through [redacted]
- [ ] Schedule initial performance plan meeting w/ performance goals
- [ ] Ensure employee completes a Financial Disclosure Report [if required] [staffing specialist]
- [ ] Set up relationship-building activities: team lunch, etc. [optional, but recommended]

Third Week

- [ ] Schedule weekly check-ins spanning first 60 days:

  Explain how role supports agency goals and priorities
  Encourage the employee to revisit agency new hire and position specific training requirements. Refer him or her to [redacted] and the Talent Development home page for additional information.
  Advise the employee of tours (HQ/Field) and other activities available through the [redacted]

- [ ] Confirm the employee has completed the Ethics Orientation Training Course in [redacted] (Course [redacted]) and provide a copy of the Ethical Conduct and Financial Disclosure order [redacted] to the employee (Connect with training program manager if needed).

Fourth Week

- [ ] Remind the new employee of the 60-day window to complete all benefits forms.
- [ ] Check in: Additional information, needs? Request feedback on onboarding process.

60 to 90 Days

- [ ] Monthly check-in meetings
- [ ] Revisit the employee's performance expectations, outcomes and further discussion involving their performance plan (if needed).
- [ ] Ensure your employee has completed required training within the prescribed time frame.
- [ ] Introduce them to self development opportunities. Refer them to [redacted] and the Talent Development home page for additional information.

Offboarding Manager Checklist

Offboarding: Ensuring the safety and security of the [redacted] for termination/resignation; retirement; transferring from one [redacted] office/organization to another [redacted] office/organization, or to another government agency; extended absence; death

At notice

[The Clearance Form*](#) must be completed before employee departure, and includes several steps. [redacted]

First, complete Part I: Employee Information and Reason for Clearance. Read the instructions.

Second, submit an [redacted] Offboarding Help Desk Ticket using the [redacted]

Extended Absence (90+ days)

To keep IT account: [redacted] must be notified otherwise, the account will be disabled or deleted after 90 day period of non-use.

Internal Transfer

Receiving managers are responsible for opening an Employee Transfer ticket for the transferring Employee through the [redacted]

At least two weeks before

Third, begin Part II of the Clearance Form: the **Clearance Checklist.** Instructions [same as at left]

Inform the [redacted]

Notify local POC for org chart changes

Draft email message to team/ stakeholders as appropriate

Coordinate with appropriate POC to release phone number [see Instructions, same as above]

Notify site or [redacted] facilities manager (see contact list) of opening space

Retirees: confirm forwarding address and phone number. Request a plaque if employee qualifies, with Management Services, [redacted]

Schedule exit interviews [confirm with JoJo]

One week before

Provide Voluntary separation questionnaire.

Check with local HR rep for any specific group, team or sub-team

Last day

Ensure equipment and IDs are collected.

3 days post

Keep an electronic and/ or hard copy of the signed Clearance Form and all supporting documentation in a secure location for **at least** [redacted] **(1) year.**

Employee death/immediate dismissal

Manager completes the Clearance Form to the best of their ability. OK to not include employee signature.

Immediately:

[redacted]

Submit the [redacted] ticket

Cancel other system credentials [see Instructions, same as above]

Then, work with employee or representative to gather [redacted] equipment and [redacted] (if possible).