



SOUTHWESTERN UNIVERSITY

Supervisor Checklist for Onboarding & Orienting New Employees

This form is to be utilized for all new hires which will enable them to have a great onboarding experience at Southwestern University. If you have any questions or require any additional guidance please email hr@southwestern.edu or call (512) 863-1435

NEW EMPLOYEE INFORMATION

Name: _____ Start date: _____

Position Title: _____ Supervisor: _____

PRIOR TO FIRST DAY

☐ Assign the New Employee (NE) a sponsor (an experienced colleague who will answer general questions). The sponsor may be the immediate supervisor of the NE or a colleague.

Sponsor's Name _____ Title _____

☐ Sponsor sends welcome message by email to NE after a successful background check email is received.

☐ Organize first week NE work assignments, arrange meetings with key contacts.

☐ Establish first-day lunch arrangements in your area or at the COMMONS with team members.

☐ Ensure workspace is prepared for the NE and keys to office or secured space is ready. Complete a [work order](#) request for keys. (For some buildings, the Pirate Card is the key).

☐ Ensure computer is ready and available for NE before first day of work (if required for job) please click [here](#) to request computer.

☐ Request a Temporary Parking pass for NE until a permanent parking pass can be requested on their own SU account.

☐ Determine what access the NE requires in addition to SU email (e.g., Colleague, department drives, etc.) and request access application from IT by contacting the ithelp@southwestern.edu or by calling x1301. Contact [Laura Gatlin](#) at to request Colleague Access.

☐ Order an SU name badge for NE. Contact [GTX Awards & Engraving](#), (512) 868-5881. Name badge will have to be picked up in person.

☐ Order Business Cards (if required) through the Marketing and Communications Department website [here](#).

First Day, First Week

- ☐ Sponsor escorts the NE to the HR office on the morning of the **first day** at **8:30am**. Night shift NE escorted to the HR office at **4:00pm**.
 - completes/turns in all new hire paperwork
 - schedules Benefits Briefing
 - Issued Pirate Card from the HR department.
- ☐ Sponsor will take NE and their computer to IT (PRC 250) to configure Windows, Ring Central, Adobe CC, Google Drive, Druva etc.
- ☐ Once NE employee has access to email, register vehicle to obtain a parking decal [here](#). Parking decal will be sent via campus mail within 48 hours.
- ☐ Issue NE a Campus [Map](#).
- ☐ Introduce NE to team.
- ☐ Have a plan to get to know the NE during the first week, lunch, coffee, campus tour, etc.
- ☐ Assign the Sponsor the following to assist the NE:
 - ☐ Provide keys to office and/or desk if applicable
 - ☐ Offer tour of office and surrounding areas including:

Restrooms	Bulletin board/ Common Information Areas	Refreshment/ Break area
Mailroom	Recycling Bin Location	Copier/Printer
Supply Area	Where to store personal belongings	Emergency exits
	Fire Extinguisher/Alarms	

POLICIES

- ☐ Review [Policy website](#)
- ☐ Review job related [Safety Policies](#). Complete the Departmental New Employee Safety Orientation Guide. Once complete, send one copy to Michael DeLance, Director of Campus Safety and Risk Management.
- ☐ Review [Staff Handbook](#)

POSITION INFORMATION

- ☐ Review position description and performance expectations and standards.
- ☐ Review initial job assignments, expectations for first week and month.
- ☐ Review job schedule and hours, including time entry if applicable, breaks, holiday calendar, policy on inclement weather days, vacation time/requests for time-off, and health absence time, SFO days.

☐ Review organizational structure. Discuss the department's function and interdependencies. Review the University's objectives, goals and [tactical plan](#).

COMMUNICATIONS

☐ Hardware and Software reviews, including:

- ☐ Email ☐ Shared Drives ☐ Data Bases (Colleague)
☐ Self Service ☐ VPN ☐ My Southwestern

☐ Review Ring Central and how to address, screen and transfer calls. Create voice mail or out of office messages.

☐ Using Google Calendar & Scheduling

☐ Using Google Share Drive

MANDATORY TRAINING

☐ Compliance Training (Will be assigned to all new employees through [Vector Solutions](#)):

☐ Attend New Employee Orientation (NEW). Contact x1435 or email hr@southwestern.edu for more information. First session will be in July 2025 Date Attended NEO:

Mandatory Training for all new employees:

☐ Cybersecurity Awareness for Employees at Educational Institutions; Security Awareness Essentials

☐ Emergency Action Plan (Department Level)

☐ Sex Harassment Staff to Staff (Staff only)

☐ Sexual Harassment Policy and Prevention (Supervisors only)

☐ Discrimination Awareness in the Workplace

☐ FERPA

Additional Training

☐ SU Driver Safety Policy ☐ Defensive Driving Course ☐ FACTA

☐ Request additional training depending on job requirements through HR and or Risk Management

☐ Schedule Training for Colleague – with [Laura Gatlin](#) at Ext. 1301

☐ Schedule Training for CONCUR with [Maria Kruger](#) at Ext. 1290

Upon completion of the checklist, the sponsor/supervisor along with the employee sign and date below. Please send a copy of this onboarding checklist to hr@southwestern.edu.

Sponsor/ Supervisor: _____ New Employee: _____