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| wsu_logo_horizontal_black_rgb.jpg | **New Supervisor Checklist (Department)**  Rev. 07/18/2022 |

Please use the following form to document your new supervisor’s onboarding. Not all items may be applicable to every employee (write “N/A”).

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| **Employee Name:** |  | **myWSU ID:** |  |

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| **Supervisor Name:** |  | **Start Date:** |  |
| **Department Name:** |  |

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| **BEFORE SUPERVISOR STARTS** |  |
| **ACTION** | **DATE COMPLETED** |
| Make desk file for supervisor information |  |
| Notify direct reports and department. Encourage support |  |
| Prepare schedule for supervisor’s first 2 weeks |  |
| Make copy of job description/expectations and department's org chart |  |
| Ensure a copy of department guidelines is available |  |
| Schedule time to meet with supervisor during first couple of weeks |  |
| Order computer, software, or other needed office equipment and supplies |  |
| Ensure work station is clean and stocked |  |
| Call Telecommunications to change desk phone header and voicemail password |  |
| Arrange for building access (WSU badge, keys, etc.) |  |
| Reach out to the new employee to discuss their schedule for their first day. Recommended topics:   * Explain parking availability (if new to the building) * Explain where (the specific location) they will report for their first day * Identify what time and who they will meet to start their first day |  |
| If the Position Action Request (PAR) process was not used to initiate this change in leadership (i.e. department chairs): |  |
| * Submit an [HR200](https://www.wichita.edu/services/humanresources/documents/200_ChangeStatus.pdf) form ([guidelines](https://www.wichita.edu/services/humanresources/Forms/Operations_Systems/200.php)) to change position and title * Submit an ePAF to add stipend * Submit an ePAF to end former supervisor’s position and stipend * Submit a [change of supervisor form](https://www.wichita.edu/services/humanresources/HR_Service_Center/docs/Change_of_Supervisor.pdf) to assign who should report to this new supervisor for timekeeping. * Submit a ticket in team dynamix to update directory office and/or extension number: <https://wichita.teamdynamix.com/TDClient/1907/Portal/Requests/ServiceCatalog> |  |
| For system access (if needed): |  |
| * Banner, Reporting Services, WSU Reporting access for assigned org (to add new supervisor and remove previous supervisor access) Submit a ticket in team dynamix: <https://wichita.teamdynamix.com/TDClient/1907/Portal/Requests/ServiceCatalog> |  |
| Notify (if needed): |  |
| * Budget Officer (BO) or Budget Review officer (BRO) – email [David.Miller@wichita.edu](mailto:David.Miller@wichita.edu) to notify of the change (to add a new BO/BRO and remove prior) and identify if this supervisor will be a budget officer or budget review office. Budget will update FWABROF and this will also provide access to PeopleAdmin |  |
| * Add to the business continuity plan as the supervisor of the org by emailing [mytraining@wichita.edu](mailto:mytraining@wichita.edu) |  |
| * If department chair change: email [gina.crabtree@wichita.edu](mailto:gina.crabtree@wichita.edu) to notify of the new chair. |  |
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| **NEW SUPERVISOR – FIRST WEEK** |  | |
| **ACTION** | **DATE COMPLETED** | |
| Introduce supervisor to internal/external staff |  | |
| Tour office, including restrooms and break areas |  | |
| Explain break room policies (food storage and community utensils) |  | |
| Explain break rules, including lunchtime and smoking policies |  | |
| Review job description and org chart |  | |
| Review telephone, long distance card, fax, e-mail, calendar use |  | |
| Review department guidelines |  | |
| Explain pay/timekeeping procedures |  | |
| Explain attendance guidelines, call-in procedures and requests for time off |  | |
| Explain work schedule and office hours |  | |
| Explain mail (incoming/outgoing) |  | |
| Explain purchase orders |  | |
| Explain building access and keys |  | |
| Explain office open/close procedures |  | |
| Explain office supplies and office equipment |  | |
| Explain building safety and emergency preparedness (tornado, fire) |  | |
| Explain dress code |  | |
| Explain travel procedures |  | |
| Explain how/where to save items on computers, networks, etc. |  | |
| Enroll supervisor in on-campus trainings such as: Campus Security Authority 2020, FERPA, Care Team, Preventing Harassment & Discrimination, Drug Free workplace training, Banner, Self-service & Reporting services Finances (Registrar), Visa Business Procurement Card Training (Financial Operations), ePAF for Approvers and Originators, ePAF Training II Requisition Approvals, Faculty Search Process (Academic Affairs), PeopleAdmin Training, myPerformance Training (staff reviews), Schedule Building I & II (Registrar), Student Inquiry, Advisor, Permission and Holds (Registrar), SSC Navigate, APS, etc. |  | |
| Schedule times for the new supervisor to sit with each department and discuss how they will interact/work together with this department, if applicable |  | |
| Record greeting/voicemail on office phone |  | |
| Order business cards, name tag, name plate, and/or uniforms, ask them to verify it has the name on it they would like to be called. |  | |
| Explain Outlook calendar procedures and set up email signature |  | |
| Discuss University and dept. missions |  | |
| Ensure supervisor will review WSU policies and procedures (<https://www.wichita.edu/about/policy/>) |  | |
| Share a campus map and show locations relevant to their job or provide services (RSC, Food Court, University Police Dept., etc.) |  | |
| Explain annual review process and expectations |  | |
| Discuss supervisor’s overall first impressions |  | |
| Schedule a planning session for annual review process |  | |
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| **NEW SUPERVISOR ORIENTATION – FIRST MONTH** |  | |
| **ACTION** | **DATE COMPLETED** | |
| If Faculty: Schedule supervisor and ensure for attendance of Academic Affairs New Chair orientation in August |  | |
| All: Complete the online form at [wichita.edu/LOrequest](https://www.wichita.edu/services/humanresources/Organizational_Development/New_Leader_Orientation/LO_Request_Form.php) to submit a request for the new leader to complete Leader Orientation. |  | |
| Meet with the supervisor regularly (weekly/bi-weekly) to ensure they are getting what they need to be successful in their training. Some suggested topics to talk about:   * How is training going? * Do you feel you have what you need to be successful in your role? * Do you have questions about your role? * Do you need anything from me? |  | |
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| **NEW SUPERVISOR/NEW EMPLOYEE – FIRST MONTH** |  | |
| **ACTION** | **DATE COMPLETED** | |
| Ensure new supervisor has completed the required Preventing Harassment and Discrimination online training |  | |
| Verify that supervisor has set up Duo Security |  | |