Boston University Campus Planning & Operations

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BOSTON
UNIVERSITY

<u>**New Employee On-Boarding Checklist**</u>

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 BUworks 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/
- ☐ Familiarize yourself with IS&T Resources at http://www.bu.edu/tech/support/employee/
- ☐ Familiarize yourself with BUWorks functions, if applicable, at http://www.bu.edu/tech/support/buworks/new-employees/ and http://www.bu.edu/tech/support/buworks/help/