Executive Onboarding Checklist

**Hiring manager/coordinator:** Please use this form to help guide your discussions with your new executive during the onboarding process. Keep completed forms in your departmental file. Contact Carolyn Cullen at 924-0247 or cc5ff@virginia.edu if you have questions related to our program.

**One Week Before Executive Starts**
- Setup and test new hire’s computer and phone
- Inform executive of onboarding process
- Schedule Grounds for Success Orientation through UHR
- Notify direct reports/peers of start date
- Order business cards

**One Day Before Executive Starts**
- Call executive to confirm start time, mutual meeting location, and where to park
- Remind executive to complete section 1 of I-9 Form (complete online on or before first day)
- Organize executive’s office and stock desk with necessary supplies

**First Day of Work – Logistics and Introductions**
- Greet new executive upon arrival
- Ensure that section 1 of I-9 Form is completed
- Overview of School/Unit and VP Area
- Introduce to department mission, goals, culture, etc.
- Tour department
- Introduce Leadership Team/Key Contacts
- Introduce Department/School Leaders
- Introduce Direct Reports and other Key Constituents and Peers
By Third Day of Work – Compensation/Leave/Emergencies

☐ Ensure completion of section 2 of the I-9 process
☐ Ensure completion of direct deposit sign up, W-4 and Va-4 using Employee Self-Service, [www.hr.virginia.edu](http://www.hr.virginia.edu)
☐ Discuss leave (holiday, PTO, vacation, jury, sick, etc.)
☐ Discuss designated or non-designated status
☐ Review Inclement Weather Policy
☐ Emergencies (department procedures, building exits, UVa Alerts Registration)

First Day/First Week – Role, Responsibilities, and Expectations

☐ Review job description
☐ Review Leadership Characteristics and UVa Competencies
☐ Review Promotion/Tenure (Teaching & Research Faculty only)
☐ Review administrative/managerial responsibilities
☐ Resources; refer to [www.hr.virginia.edu](http://www.hr.virginia.edu); [http://provost.virginia.edu/](http://provost.virginia.edu/)
☐ Social networking opportunities (through department and Executive Onboarding Program)
☐ Discuss required training (if any)

Within First Two Weeks of Executive Starts

☐ Follow-up with executive to answer any questions
☐ Determine if executive’s expectations of the job are being met
☐ Review managerial responsibilities, if necessary

Within First Month of Work - Performance Management

☐ Establish performance expectations
☐ Promotion/Tenure (Teaching and Research Faculty Only)
☐ Resources; refer to [www.hr.virginia.edu](http://www.hr.virginia.edu); [http://provost.virginia.edu/](http://provost.virginia.edu/)

Within First Month of Work - University Policies & Procedures

☐ Discuss zero tolerance policy for harassment and discrimination
☐ Discuss ethics and code of conduct
☐ Use of University property (computer, fax, phone, copy machine, etc)
☐ Performance expectations
☐ Resources; refer to [www.hr.virginia.edu](http://www.hr.virginia.edu); [http://provost.virginia.edu/](http://provost.virginia.edu/)
Two Months After Executive Starts

☐ Post Onboarding Interview
☐ What is working well?
☐ What is not working well?
☐ How can we improve the onboarding process?
   ☐ ___________________________________________________
   ☐ ___________________________________________________