



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
- 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://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://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://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?
- _____
- _____