SUPERVISOR'S CHECKLIST FOR
ONBOARDING FOR NEW EMPLOYEES

New Employee Information

Employee Name: _____   Start Date: _____

Position Title: _____   Assigned Sponsor: _____

Contact Telephone Number: _____   Supervisor/Rater: _____

Contact Email: _____   Higher Level Reviewer/Senior Rater: _____

PLANNING FOR SUCCESS:

Within Three (3) Days of Formal Job Offer and Acceptance (As Confirmed by CPAC)

❑ 1. Obtain firm entrance on duty (EOD) date from Civilian Personnel Advisory Center (CPAC).

❑ 2. Contact new employee (preferably by phone) to welcome him/her to the Army team and your organization.

- ■ Confirm start date.
  - ■ NOTE: Notify CPAC if employee believes the start date is different from what the CPAC stated.
- ■ Request new employee's pre-employment (personal) telephone and email contact information.
  - ■ Record contact information in new employee information section of this checklist, above, and provide to sponsor.

❑ 3. Send the new employee a welcome letter or email with a copy of the "New Employee Onboarding Handbook" and "New Employee Onboarding Handbook Checklist."

- ■ Access and customize "Supervisor Letter to New Employee Template" from the Army Career Tracker (ACT) Army Civilian Onboarding Community.

❑ 4. Select and assign a sponsor for new employee and meet with the sponsor to explain their role and responsibilities, and review the sponsor checklist.

- ■ NOTE: In the event you are unable to assign a sponsor, incorporate key provisions of "Sponsor Letter to New Employee Template" into your (supervisor) welcome letter (discussed in action #3 above).
  - ■ Also, be sure to review and take important actions listed on Sponsor Checklist which is accessible from Army Civilian Onboarding website:

PLANNING FOR SUCCESS:

At Least One (1) Week Before Start Date

☐ 5. Announce pending arrival of new employee to the new employee's higher level reviewer and other appropriate senior leaders within the Command, and draft Command senior leader welcome letter for review/release by the appropriate senior leader.

   ■ Access and customize "Command Senior Leader Letter to New Employee Template" from ACT Army Civilian Onboarding Community, and route for signature.

☐ 6. Announce pending arrival of new employee to members of the staff in the new employee's organization.

   ■ Access and customize "Staff Introduction Email Template" from the ACT Army Civilian Onboarding Community and send it as an announcement email to the staff.

☐ 7. Review work area and confirm an assigned workstation, desk, work bench, chair, computer, network, telephone, office supplies, or other required tools and equipment are in place prior to the new employee's first day.

☐ 8. Gather all historical information from the predecessor (if possible), such as best practices, files, records, and metrics to pass along to the new employee.

☐ 9. Determine what system access will be required by the new employee and initiate a System Authorization Access Request (SAAR), DD FORM 2875, if required, to be signed by new employee on first work day (or during first week).

☐ 10. Arrange your schedule to be available to meet with the new employee on his/her first day and inform the assigned sponsor of the desired meeting time and place.

   ■ Record date, time, and location of meeting: _____

☐ 11. Schedule your new employee to attend/receive your Command Welcome Briefing.

   ■ Record date, time, and location of Command Briefing/Orientation: _____

☐ 12. Determine what the new employee needs to know to become productive as soon as possible, and identify training, important introductions, and administrative activities to be accomplished by the employee in the first week or two. Use this information to plan the employee's first assignment or activities for that period.

MAKING A GOOD FIRST IMPRESSION:

First Day

❑ 13. Ensure sponsor meets and escorts new employee upon completion of CPAC orientation or designated Human Resource (HR) orientation at an arranged location, and escorts to his/her workstation. Pre-arrange alternate in the event of sponsor's absence.

❑ 14. Ensure technical assistance is available to help new employee set up computer and access network resources.

  ■ May need to defer until after new Common Access Card (CAC) has been issued and system access has been granted.

   ■ If CAC and/or system access is delayed, arrange for the employee to use a computer kiosk to access publicly available sites (e.g., Center for the Army Profession and Leadership (CAPL) Army Values: https://www.army.mil/values/).

    ■ Record name of technical point of contact (POC) and time he/she will be available: _____

❑ 15. Meet with new employee to discuss first day activities and plan for the balance of the first week.

  ■ Try to personalize experience with something unique for the new employee, such as a welcome note from the staff, name plate, etc.

  ■ Give introductions to department staff and key personnel.

  ■ Provide a copy of the new employee's position description and describe the importance of the employee's responsibilities.

  ■ Provide and review the contents of the welcome pack (if one was assembled).

   ■ Ensure new employee receives the New Employee Onbaording Handbook.

  ■ Obtain new employee's signature on the SAAR (if required) and submit it for processing to ensure employee gains needed system access as quickly as is feasible.

  ■ Explain that, during the first 30 days, you will have discussions about performance expectations and training requirements, and that these discussions will result in completion of a performance plan and IDP, by the 30th day.

❑ 16. Conduct, or arrange for the sponsor to conduct, a tour of the facility, including:

■ Office/Desk/Workstation	■ Restrooms	■ Tools/Equipment
■ Copy Centers	■ Mail Rooms	■ Coffee/Water/Vending Machines.
■ Printers	■ Bulletin Boards	
■ Kitchen/Cafeteria/Break Areas	■ Authorized Work Areas	
■ Emergency Exits and Procedures	■ Security Office	
■ Fax Machines	■ Conference Rooms	
	■ Parking	
	■ Office Supplies	

❑ 17. Review general administrative procedures, or arrange for sponsor to review:

- Keys/Access Cards (Building and Computer)
- Telephone Alert Roster
- Telephone Access Policy and Procedures.

Within First Week

❑ 18. Ensure employee is issued an Army CAC.

- Employee may have scheduled an appointment: https://idco.dmdc.osd.mil/idco/
- Troubleshoot as needed to ensure CAC issuance is not delayed.

❑ 19. Ensure employee completes DoD Information Assurance (IA) Awareness Training (https://cs.signal.army.mil/login.asp).

❑ 20. Provide new employee with overview of your organization and its mission, including an explanation of how your division's mission supports the overall mission of the Command and the Army. Ensure new employee understands how his/her role supports your organization, Command, and the Army missions.

❑ 21. Ensure that one or more senior leaders (including the higher level reviewer), welcomes new employee as soon as possible.

❑ 22. Send email to new employee's Functional Chief (FC)/Career Field Director (CFD) (with copy to Functional Community Representative (FCR)), notifying of new employee's EOD into the Career Field, and asking FC and CFD to send a welcome letter.

- Access and customize "Supervisor Email to FC Template to trigger FC Welcome Letter" from the ACT Army Civilian Onboarding Community and send it as a trigger for the CFD to send CFD Welcome Letter.

❑ 23. Inform the new employee of regularly scheduled meetings and send invitations to any regularly scheduled meetings (e.g., staff and department) to employee's inbox and calendar.

❑ 24. Give employee his/her initial assignment. (Make it something small and doable.) Ensure that the assignment constitutes meaningful work—either training or substantive task assignment related to the new job and CP.

- If computer access is not immediately available, work or training assignments might include reading and/or shadowing others who have a similar job.

❑ 25. Debrief with employee after he/she attends initial meetings, attends training, and begins work on initial assignment.

- Also touch base quickly each day.

- ❑ 26. Conduct an initial performance counseling session:
  - ■ Review position description, typical and anticipated work assignments, and performance expectations;
  - ■ Describe how employee's job fits in the organization, and how the job and organization contribute to accomplishing the Command and Army mission;
  - ■ Explain which organizations and entities are customers of the work and which support the organization in completing its mission; and
  - ■ Explain the annual performance review and goal-setting process. Explain that you will work together to establish a performance plan within the first 30 days.

- ❑ 27. Conduct an initial training and development counseling session:
  - ■ Review training and education requirements (e.g., Civilian Education System (CES) grade-level requirements/ Supervisor Development Course (SDC) if applicable).
  - ■ Explain that you will work together to establish an individual development plan (IDP) within the first 30 days.

- ❑ 28. Introduce new employee to the Army Values—Loyalty, Duty, Respect, Selfless Service, Honor, Integrity, Personal Courage.

- ❑ 29. Assist new employee with learning about Military rank and insignia and titles of address for senior civilians.

- ❑ 30. If the employee is in a bargaining unit position, inform the employee who their union representative is and how to reach him/her.

- ❑ 31. Ensure new employee's name is added to local directories, relevant email distribution lists, and SharePoint site permissions.

- ❑ 32. Ensure the new employee logs into ACT (https://actnow.army.mil) and identifies and selects his/her 1st and 2nd Line Supervisors in ACT.
  - ■ The 1st line supervisor is the employee's "rater" and the 2nd line supervisor is the employee's higher level reviewer.
  - ■ Ensure the new employee is informed of the correct supervisors to select; these should be identified in the "New Employee Information" above.
  - ■ ACT will send reminders or system prompts until this step is completed. Employee will be unable to navigate in ACT unless supervisors are identified in a timely manner.

- ❑ 33. Accept request in ACT as supervisor for new employee.
  - ■ ACT will send reminders or system prompts until this step is completed.

☐ 34. Review key administrative policies:

- Time and Attendance
- Family and Medical Leave Act (FMLA)/Leaves of Absence
- Vacation/Annual Leave and Sick Leave Reporting
- Overtime
- Severe Weather Procedures
- Diversity Awareness

- Sexual Harassment/Assault
- Holidays
- Performance Reviews
- Appropriate Attire
- Safety
- Official Use of Govt. Property
- Ethics/Joint Ethics Regulation

- Standards of Conduct
- Progressive Disciplinary Actions
- Visitors/Security
- Emergency Procedures
- Confidentiality (specific procedures to safeguard confidential/sensitive material).

☐ 35. Review computer use policies:

- Establish Email
- Intranet/SharePoint
- Shared Drives/One Drive
- Databases
- Internet Use

- VPN/Mobile Phone
- Outlook Address List Profile
- Microsoft Office
- Other Software/Applications.

☐ 36. Review general administrative procedures:

- Business Cards
- Purchase Requests
- Vehicle Registration
- Govt. Travel Card
- Conference Rooms
- Organizational Policies

- Official Travel
- Mail (incoming and outgoing)
- Shipping (FedEx, DHL, and UPS)
- Military Driver Requirement
- Defense Travel System

Within First 30 Days

☐ 37. Explain use of and ensure the new employee creates an account in and updates MyBiz.

☐ 38. Explain the use of and ensure the new employee creates a student account in ArmyIgnitEd.

☐ 39. Arrange for employee to meet the functional community representative (FCR), or appropriate representative to discuss the purpose and value of Talent Management, review Army Civilian Talent Development Program (ACTDP) plan, and to learn about career development support available from the CP.

- Record date, time, location for meeting with FCR: _____

❑ 40. Meet with the employee to identify and discuss short/long term training requirements (CES, SDC, Career Field, Army Regulation (AR) 350-1 required training as well as organizational training, etc.).

❑ 41. Ensure the employee uses information discussed above to create an IDP, including development goals, in ACT.

❑ 42. View, review, and approve the employee's IDP in ACT.

■ Record date IDP approved in ACT: _____

❑ 43. Meet with new employee to develop and review performance plan, including elements and standards.

❑ 44. Arrange for higher level reviewer to meet with and counsel new employee, and approve the performance plan.

■ Record date, time, and place for higher level reviewer meeting: _____

❑ 45. Enter date performance plan approved and signed into ACT.

■ Record date performance plan completion date entered into ACT: _____

❑ 46. Arrange for new employee to meet key partners from other departments.

❑ 47. Provide feedback to new employee about work assignments, training, and seek feedback about job satisfaction to date.

■ Conduct regularly occurring one-on-one meetings;

■ Provide timely, ongoing, meaningful "everyday feedback;" and

■ Elicit feedback from the employee and be available to answer questions.

Within First 90 Days

❑ 48. Discuss what it means to be part of the Army Profession according to Army Doctrine Publication (ADP) 6-22 *Army Leadership and the Profession*.

❑ 49. Provide training, as needed, to help new employee understand internal systems, general operating practices, and obtain other information or skills required in the performance of his/her job.

❑ 50. Coach, counsel, and give performance feedback early and often to new employee.

■ Recommend at least once a month;

■ At a minimum, meet for informal 3-month performance check-in.

❑ 51. Have employee "shadow" you at meetings to get exposure to others and learn more about the department and organization.

❑ 52. Meet with employee to discuss whether required training has been completed or scheduled and to determine whether any assistance is required to complete training or whether any adjustments are needed to the IDP.

Within First 180 Days

❑ 53. Continue to talk with new employee about expectations, culture, and the Army Profession.

❑ 54. Ensure new employee is on track to complete grade-level CES requirements and SDC if applicable.

❑ 55. Conduct mid-point performance counseling. Meet with new employee for formal performance feedback, review of IDP, and career goals. Arrange for higher level reviewer to meet with and counsel new employee.

- Record date mid-year performance review conducted: _____

❑ 56. Continue to provide and/or arrange coaching, counseling, and mentoring.

- Explore ACT for mentoring opportunities.

Within First Year

❑ 57. Encourage participation in training, webinar sessions, learning activities, and other outreach/development activities.

❑ 58. Ensure employee completes onboarding requirements, including CES training requirements and SDC (if required).

❑ 59. Continue to look for opportunities to integrate your new employee with the work groups/teams, and into the organization as a whole.

❑ 60. Celebrate successes and recognition of employee's contributions.

- Take prompt action (well before the end of the probationary period) to correct poor performance and/or conduct issues.

❑ 61. Continue to meet regularly with new employee to review and revalidate performance and training plans and developmental goals. Discuss performance as an Army Professional and monitor progress in competence (knowledge, skills, and abilities), character (ethical conduct and behavior), and commitment (to duty, mission accomplishment, and Army values).

❑ 62. Encourage your new employee to share ideas for improving the operations, strategies, work, and/or culture of the organization.

❑ 63. Complete annual performance appraisal.

■ Meet with employee to review appraisal and counsel employee.

■ Arrange for higher level reviewer to meet with and counsel employee.

■ Record date final annual appraisal completed: _____

❑ 64. Arrange recognition of onboarding completion and award certificate as an Army Professional.

❑ 65. Solicit employee's feedback and suggestions on ways to improve the onboarding experience.

Helpful Links and Information

Forms and Resources:

❑ ACT: https://actnow.army.mil/

❑ ArmyIgnitED: https://www.armyignited.com/app/

❑ Center for the Army Profession and Leadership (CAPL) at: https://capl.army.mil/civilians.php

❑ Sponsor Checklist at Army Civilian Onboarding website: https://civilianonboarding.chra.army.mil/onboarding/

❑ New Employee Onboarding Handbook at Army Civilian Onboarding website: https://civilianonboarding.chra.army.mil/onboarding/

❑ MyBiz: https://compo.dcpds.cpms.osd.mil/

❑ MyPay: https://mypay.dfas.mil/mypay.aspx

Required Training:

❑ Cyber Security User Portal/IA Training: https://cs.signal.army.mil/login.asp

❑ CES and SDC enrollment: https://armyuniversity.edu/amsc/EducationalPrograms

Any additional organizational requirements.