

## On Boarding of Directors

### Onboarding Support Assistant:

#### Prepare Work Essentials:

- Assign a phone extension and ensure voice mail set up
- Refer to Hiring Managers New Employee Orientation Checklist on the Getting Started at Pace website: HR>Getting Started at Pace>Hiring Manager
- Contact ITS technician: (before 1<sup>st</sup> day or on first day)
  - o Ensure Director's computer is wiped clean
  - o Map Network Drive
  - o Map printer
  - o Ensure all needed software is loaded and configured
- Order office supplies, keys, name plate, business cards, and corporate phone or credit cards, if applicable
- Prepare announcement of new hire for area and other areas new hire will work closely with

#### Gather Important Information:

- Gather vital reference materials for **transition notebook/folder:**
  - o Voice mail instructions
  - o Phone extension instructions (add "3" to last for digits of PLV phone number to dial to another campus; add "4" for WP; add "2" for Valhalla; and "1" for NY).
  - o **Organizational charts:** (Available via OrgPlus on Pace Portal)
    - High Level (President and Direct Reports)
    - Division/School (with titles)
    - Department
  - o **Staff Directory** of entire department - names , titles and phone numbers
  - o Current list of staff addresses/telephone numbers for emergency use
  - o **Job Descriptions** of all in Department (via PeopleAdmin)
  - o **Copy of current Strategic Plan for University**
  - o Division and Department **goals** for current year and status
  - o Link to Employee Handbook and Policies
  - o **Administrative Responsibilities –**
    - Budget Documents
    - Grants
    - Reports
    - PeopleAdmin (keeping dept position descriptions current; recruitment/posting for open positions, etc.)
    - Performance Management and Development Process
  - o Information on **Committees and Councils** they may be involved in
  - o **Training Section –** reminder REQUIRED Preventing Sexual Harassment Training is to be completed w/in within 30 days of receiving the Workplace Answers email ; training dates

<input type="checkbox"/> Other important materials: <ul style="list-style-type: none"> <li>○ Current Emergency Action Plan for Division: identify: fire marshall(s); the department's evacuation plan; and business continuity plan and notebook</li> <li>○ Pace Annual report and related marketing materials</li> </ul>
<b>Schedule Training and Meetings</b>
<input type="checkbox"/> Attend monthly New Employee Orientation Program and Benefits Sign-up (within 30 days of hire)
<input type="checkbox"/> Arrange via Help Desk System one-on-one training with User Services (PL – x33643; NY- x11737) for: Overview of Pace Systems; Blackberry; Outlook; how to set up VPN; Portal
<input type="checkbox"/> Arrange Finance training with: <ul style="list-style-type: none"> <li>○ Financial Services (Shuana Thompson x22751) for overview and training on Chart of Accounts; Finance Budget Management; Kronos;</li> <li>○ For Contracts Administration (Novlette Gooden-Castillo x22690)</li> <li>○ For E-Procurement and Purchasing Credit Cards and Travel Cards (Purchasing x22621)</li> </ul>
<input type="checkbox"/> Arrange training on Pace's Automated Payment Actions System with Ann Courtien (x22658)
<input type="checkbox"/> Arrange a meeting with area Budget/Business Rep for a budget overview and strategic conversation
<input type="checkbox"/> Arrange for training on OrgPlus – Pace's Administrative Organizational Charts and SCT Banner training, if applicable (Technology Training Manager x22635)
<input type="checkbox"/> Arrange for training on PeopleAdmin with the Talent Acquisition department ( x22730) (Overview of Position Description Function; Posting; Applicant Tracking Function)
<input type="checkbox"/> Arrange overview of Performance Management and Development Process (Susan Donahue x22766)
<input type="checkbox"/> Register for required Management training (Susan Donahue x22766)
<input type="checkbox"/> Schedule meetings with direct reports during first week, if possible.