POSTDOC ONBOARDING CHECKLIST			
Task	**New Hire**	**Work unit supervisor or designee**	**Penn State HR**
Pre-hire			
Offer - Once a verbal offer is accepted, move the final candidate to the offer stage in Workday and complete offer steps. The official offer letter will be drafted and sent to the candidate through Workday. Remind candidate to be on the lookout for an email notification directing them to log into Workday and accept the offer.		✓	
Sign and return offer letter through Workday	✓		
Provide PII for Penn State account setup. Candidate will receive an email notification prompting them to provide their PII in Workday.	✓		
If required, complete iStart steps to initiate the visa process. If the postdoc's ID# and access ID are needed, contact the HR consultant.		✓	
Complete authorization for background check after receiving email notification from Penn State Human Resources - **Note: If a postdoc is offered a position more than 6 months in advance of the start date, the background check will not be processed until closer the effective date of employment.**	✓		
Send Welcome Email - Once the background check returns a favorable result, the new hire will receive an email from HumanResources@psu.edu with steps to start the Onboarding Journey. The manager recruiting support, hiring manager, and HR consultant will be copied on the email. **Note: Same as the background check. If employment is offered more than 6 months in advance of the start date, the welcome email will not be issued until closer to the start date.**			✓
Complete Onboarding Journey (I9, benefit elections, etc.) During this time, the new postdoc will receive the welcome email and several email notifications to complete various steps of the onboarding process. **Benefits Orientation - Important sections for postdocs to review duirng the on demand benefits orientation are: Medical, Dental, and Age Graded Life Insurance. Benefits orientation is a step in the Onboarding Journey**	✓		
Keep in touch with new hire during this time, ask about needs and concerns, direct to appropriate resources. **Remind the postdoc to keep an eye on their email for their onboarding notification and tasks.**		✓	
Provide new postdoc with the website to the Postdoctoral Affairs office. The website includes important information related to housing, postdoc benefits, etc. **https://www.research.psu.edu/opa**		✓	
Identify department specific required trainings		✓	

Task	New Hire	Work unit supervisor or designee	Penn State HR
Confirm parking pass availability. Upon completion of in-person onboarding with HR Shared Services, postdocs will receive a temporary parking pass which expires in 7 days from the issue date. Permanent passes should be obtained through the EMS parking chair Meranda Kaiser (mlp5247@psu.edu)		✓	
Preparation for new hire:			
❑ Order a nameplate and welcome sign for the workspace			
❑ Request cleaning of the new employee's workspace			
❑ Order/assign the computer and schedule set up with IT			
❑ Request/confirm work phone number		✓	
❑ Make sure the workspace has appropriate supplies			
❑ Plan the new postdocs schedule for the first 1-2 weeks, including opportunities to meet with other postdocs, shadow, get training on specific tasks or systems, and meet with the department head or director			
❑ Have several short-term job assignments ready for the new employee to work on			
❑ Schedule meet and greet with EMS HR (John Barlett jvb102@psu.edu or HR consultant)			
Optional but strongly encouraged:			
❑ Arrange a welcome reception			
❑ Schedule a small group lunch		✓	
❑ Ask the postdoc to provide you with a brief bio and photo for introduction email			
❑ Pair postdoc with a peer, review what you expect and encourage the peer to reach out to the new hire			
Task	**New Hire**	**Work unit supervisor or designee**	**Penn State HR**
Day 1			
Plan for new hires first day (be available to assist and answer questions, introduce co-workers, IT assistance as needed, etc.)		✓	
Give an office/building tour (campus tour optional)		✓	
Provide keys, ensure swipe card access has been assigned, etc.			
IMPORTANT: Confirm postdoc has completed their I9 document verification session or is scheduled to complete it within 3 business days of the start date. Missing this step could result in immediate separation for non-compliance. They will also receive their temporary parking permit, and ID card at onboarding with HR Shared Services.		✓	

Put postdoc in touch with EMS parking chair to obtain the permanent parking pass that was assigned to them.		✓	
Provide postdoc with a list of important department contacts (who does what)		✓	
Week 1-2			
Add to EMS postdoc listserv (accounts.psu.edu), relevant department listservs, calendars, etc.; share key upcoming events and deadlines		✓	
Contact EMS Marketing and Communication Website Manager (Cynde Fleagle - cys7@psu.edu) to update the new employee to the College Directory		✓	
Send POEMS (Postdocs of EMS) an email notifying them that a new postdoc has started including name, department, email address and start date. Also confirm in email that the postdoc has been added to the postdoc listerv. **(poems.psu@gmail.com)**		✓	
Provide information on office safety & workers' comp process and review fire drill protocol		✓	
Discuss initial assignments & provide feedback		✓	
Assess short term training needs (including diversity/inclusion, etc.)		✓	
Remind postdoc to complete all steps related to their onboarding journey. More information about the University onboarding process can be found at: **https://psuportal.neocaseonline.com:443/Default.aspx?PageId=1218&gse=1&gwd=onboarding**		✓	
Provide details on role and job responsibilities; work on goal setting		✓	
Weekly check in—schedule for at least first 6 weeks		✓	