

UNIVERSITY ADVANCEMENT PROCEDURE MANUAL		
Section:	Human Resource	Number:
Subject:	On-Boarding and "Buddy" Procedure	Revision: 9/9/16
Approval:		Distribution:
<p>General Information: Every phase of the onboarding process with a new employee is important, from before they begin their job, through their first month, to the successful completion of their first year. With an eye toward goals of helping create a welcoming atmosphere and providing the guidance necessary for new hires to acclimate to life at UNCG, we've designed a useful checklist that provides a step-by-step guide for supervisors in UA to navigate this process and help make your new employee as comfortable as possible as soon as possible.</p>		

EMPLOYEE: _____

SUPERVISOR: _____

BUDDY: _____

When	Task	Responsible Office (Spearheaded By Supervisor)	Completed Date
Prior to First Day	Assign "Buddy" from same department and provide Buddy with instructions on their responsibilities. **click to see Buddy Responsibilities below**	Supervisor (or designee)	
Prior to First Day	Email announcement to all UA staff of new employee	Supervisor (or designee)	
Prior to First Day	Order PC or set up used PC	Supervisor to work with HR Liaison (S. Butler)	
Prior to First Day	Order office supplies	Supervisor to work with HR Liaison (S. Butler)	
Prior to First Day	Order business cards (if applicable)	Supervisor to work with HR Liaison (S. Butler)	
Prior to First Day	Name badge	Supervisor to work with HR Liaison (S. Butler)	
Prior to First Day	Order name plate for office door	Supervisor to work with HR Liaison (S. Butler)	
Prior to First Day	Complete key request form (building & suite)	Supervisor to work with HR Liaison (S. Butler)	

Prior to First Day	Complete online request form for Phone Services to establish voice mail acct	Supervisor to work with HR Liaison (S. Butler)	
Prior to First Day	Print I-9, W-4, direct deposit forms for new hire (w/in 1st 3 days)	Supervisor to work with HR Liaison (S. Butler)	
Prior to First Day	1) Have employee added to: -UA list serv -other appropriate listservs (MGO, etc.) 2) Make sure employee has proper access to shared drives	Supervisor to work with Data Manager (frmly A. Bonay)	
Prior to First Day	Complete online computer account activation forms per instructions from "employment letter" email sent by HR to the employee's personal email address sent prior to first day (UNCGenie & email)	Employee	
Prior to First Day	Have employee added to UA Directory sheet	Supervisor to work with VC Exec Asst. (D. Castaldo)	
Prior to First Day	Send the new employee a welcome Email along with schedule for first day/week, tell them you've reserved a parking space for them for their 1 st day, and instructions on: 1) obtaining parking pass 2) dates for upcoming HR orientations 3) Campus map 4) Set appointment with Data Manager in Advancement Services for first week of employment. 5) Provide the date of the 1 st available employee orientation 6) Provide the UA calendar of events for the remainder of the fiscal year.	Supervisor (or designee)	
Prior to First Day	Assign mailbox (based on office location)	Supervisor (or designee)	
Prior to First Day	Complete Banner Advancement Data Access Request form **Click here for form**	Supervisor to provide form to employee	

First Week or Soon Thereafter	Tour of office	Buddy	
First Week or Soon Thereafter	1) Install drivers to get UA Banner access 2) test UNCG login 3) test Banner access 4) test UABanner access	Supervisor to work with Data Manager (frmly A. Bonay)	
First Week or Soon Thereafter	For MGOs review the kinds of pushed emails that will be coming his/her way (dept reports, notices of prospect changes, etc)	Advancement Services	
First Week or Soon Thereafter	For MGOs review how the new MGO is to work with the Chancellor's office in regards to event and appointments.	Supervisor (or designee)	
First Week or Soon Thereafter	For MGOs review how the new MGO is to work with the Office of Gift Planning	Supervisor (or designee)	
First Week or Soon Thereafter	Review team meeting schedules and expectations.	Supervisor (or designee)	
First Week or Soon Thereafter	Pick up keys from Sink Building (building & suite keys)	Buddy & Employee	
First Week or Soon Thereafter	Provide instructions for phone set up and test	Employee and HR Liaison (S. Butler)	
First Week or Soon Thereafter	Go to Walker Deck parking services and get parking tag	Buddy & Employee	
First Week or Soon Thereafter	Provide current copy of UA Directory sheet	Supervisor to work with VC Exec Asst. (D. Castaldo)	
First Week or Soon Thereafter	Schedule photo shoot (if needed) for website (University Relations)	Buddy & Employee	
First Week or Soon Thereafter	Add employee contact/photo to UNCG website	Supervisor to work with VC Exec Asst. (D. Castaldo)	
First Week or Soon Thereafter	Invite new employee to lunch	Buddy	
First Week or Soon Thereafter	Request LINUX account form (if using CoreFTP for loading data files) **Click here for form – will need to log in**	Director of Advancement Services	
First Week or Soon Thereafter	Complete I-9, W-4, direct deposit forms and submit to HR (w/in 1st three days of start date)	Employee	
First Week or Soon Thereafter	Get University ID card made (at EUC) after Banner account is created	Buddy & Employee	

First Week or Soon Thereafter	Sync Smartphone for Gmail & calendar access	Buddy & Employee (assistance available in Tech Support Center, 101 Forney)	
First Week or Soon Thereafter	Overview of Gmail calendar - create appointments, invites	Buddy / Lead MGO Admin	
First Week or Soon Thereafter	Provide new employee UNCG emergency contact number	HR Liaison (S. Butler)	
First Week or Soon Thereafter	Cell phone subsidy (if applicable)	HR Liaison (S. Butler)	
First Week or Soon Thereafter	Obtain emergency contact info	HR Liaison (S. Butler)	
First Week or Soon Thereafter	Provide copy of time sheet and link to electronic version	HR Liaison (S. Butler)	
First Week or Soon Thereafter	If SPA non-exempt, provide schedule of SPA time sheet filing	HR Liaison (S. Butler)	
First Week or Soon Thereafter	Copy of state holidays for calendar year	HR Liaison (S. Butler)	
First Week or Soon Thereafter	Review adverse weather policy and give copy	HR Liaison (S. Butler)	
First Week or Soon Thereafter	Provide access to Conference Room calendars	Lead MGO Admin	
First Week or Soon Thereafter	Campus tour	Buddy	
First Week or Soon Thereafter	Introductions at W. Market St. Offices	Buddy	
First Week or Soon Thereafter	Introductions at Alumni House/Faculty Center	Supervisor (or designee)	
First Week or Soon Thereafter	Instructions for disposal of confidential material	Supervisor (or designee)	
First Week or Soon Thereafter	Copy of employee driver's license for file (state car use)	HR Liaison (S. Butler)	
First Week or Soon Thereafter	Instructions on use of state cars, reservation process (lead MGO admin)	Lead MGO Admin	
First Week or Soon Thereafter	Instructions for remote access to voicemail	Lead MGO Admin	
First Week or Soon Thereafter	Instructions for use of copier/scanner	Supervisor (or designee)	
First Week or Soon Thereafter	Instructions for gifts & payments by phone (mainly for admin assistants)	Lead MGO Admin	
First Week or Soon Thereafter	For MGO's, instructions on creating Statement of	Donor Relations	

	Establishment (SOE) and Statement of Intention (SOI)		
First Week or Soon Thereafter	Review rules about requesting vacation time, sick leave from supervisor	Supervisor (or designee)	
First Week or Soon Thereafter	Overview of where data is stored on shared drives, google, hard copy files at 1100 W. Market St., etc.	Supervisor (or designee)	
First Week or Soon Thereafter	Guidelines as to what data should not be stored	Supervisor (or designee)	
First Week or Soon Thereafter	Overview of guidelines of confidentiality and what should not be emailed.	Supervisor (or designee)	
First Week or Soon Thereafter	Review PMP process (annual work plan, mid-term review, final review) and discuss objectives for remainder of year.	Supervisor (or designee)	
First Week or Soon Thereafter	Set up supervision meetings	Supervisor (or designee)	
First Week or Soon Thereafter	Training: Internet Native Banner (INB) navigation and Provide UAHELP overview document	Advancement Services	
First Week or Soon Thereafter	Training: INB and UA Banner report overview	Advancement Services	
First Week or Soon Thereafter	Training: INB and UA Banner report (hands on)	Advancement Services	
First Week or Soon Thereafter	Training: INB address/phone/email updates (if required by job description)	Advancement Services	
First Week or Soon Thereafter	Training: INB bio updates (if required by job description)	Advancement Services	
First Week or Soon Thereafter	Training: Prospect Tracking Module including call report entry (if required by job description)	Prospect Research	
First Week or Soon Thereafter	Add to appropriate "staff leave" Gmail calendars (Advancement Services, Development Office, etc – depending on what part of UA new employee is in)	Director of Advancement Services	
First Week or Soon Thereafter	Take the Online Security training	Employee	

UA Buddy Responsibilities

Hi John:

Thanks for being a Buddy to Jane Doe!

Being a Buddy means:

- 1.) making the new person feel welcome
- 2.) being on hand to answer any questions (work-related or not)
- 3.) informally helping introduce the new person to colleagues

Please be sure to do the following:

1) PRIOR TO FIRST DAY: Introduction Email

Please email Jane and introduce yourself as her buddy (don't forget to explain what this means). In your email, let Jane know that you will meet her on her first day (Tuesday, September 8). You can also let her know what to expect during the first day on the job. You may want to check with her supervisor for more information.

2) PRIOR TO FIRST DAY: Review the onboarding procedure document

Do this to completely understand all your responsibilities as a "Buddy".

3) FIRST DAY: Greet and Gift

Please greet Jane. Escort Jane to obtain an UNCG ID, while casually walking her around campus for an introductory tour.

You will then return to the office and give Jane a moment to drop things off at her new desk and then give her an office tour, including introductions to anyone you come across. On the walk, please include things such as, supplies closet, all-staff copiers, restrooms, kitchen, reception desk and the conference rooms.

4) FIRST WEEK: Lunch

Within the first week of the Jane's arrival, take her out to lunch. This could be one-on-one or a small group lunch. This lunch can be reimbursed.

5) LATER: Check-in

Check in with Jane to see how she is doing and make sure to ask about any additional questions, concerns, or challenges. These check-ins should be fairly frequent during Jane's first month on the job and are not formal meetings— you can simply stop by to say "Hi, how's everything going?" or could grab a quick coffee.

If Jane has issues that you are unsure how to deal with or you think someone else should know about, please report these items to Susan Butler immediately so that she can take additional steps if necessary.

Jane is a new member of our team who should feel welcome! You play an important role in helping her transition to our office. Please let me know if you have any questions about being a buddy.

Thank you for all your help in creating a welcoming work environment!