WICHITA STATE UNIVERSITY

New Supervisor Checklist (Department)
Rev. 07/18/2022

Please use the following form to document your new supervisor's onboarding. Not all items may be applicable to every employee (write "N/A").

Employee Name: _____ **myWSU ID:** _____

Supervisor Name: _____ **Start Date:** _____

Department Name: _____

BEFORE SUPERVISOR STARTS	
ACTION	**DATE COMPLETED**
Make desk file for supervisor information	
Notify direct reports and department. Encourage support	
Prepare schedule for supervisor's first 2 weeks	
Make copy of job description/expectations and department's org chart	
Ensure a copy of department guidelines is available	
Schedule time to meet with supervisor during first couple of weeks	
Order computer, software, or other needed office equipment and supplies	
Ensure work station is clean and stocked	
Call Telecommunications to change desk phone header and voicemail password	
Arrange for building access (WSU badge, keys, etc.)	
Reach out to the new employee to discuss their schedule for their first day. Recommended topics: • Explain parking availability (if new to the building) • Explain where (the specific location) they will report for their first day • Identify what time and who they will meet to start their first day	
If the Position Action Request (PAR) process was not used to initiate this change in leadership (i.e. department chairs):	
• Submit an HR200 form (guidelines) to change position and title • Submit an ePAF to add stipend • Submit an ePAF to end former supervisor's position and stipend • Submit a change of supervisor form to assign who should report to this new supervisor for timekeeping. • Submit a ticket in team dynamix to update directory office and/or extension number: https://wichita.teamdynamix.com/TDClient/1907/Portal/Requests/ServiceCatalog	
For system access (if needed):	
• Banner, Reporting Services, WSU Reporting access for assigned org (to add new supervisor and remove previous supervisor access) Submit a ticket in team dynamix: https://wichita.teamdynamix.com/TDClient/1907/Portal/Requests/ServiceCatalog	
Notify (if needed):	
• Budget Officer (BO) or Budget Review officer (BRO) – email David.Miller@wichita.edu to notify of the change (to add a new BO/BRO and remove prior) and identify if this supervisor will be a budget officer or	

budget review office. Budget will update FWABROF and this will also provide access to PeopleAdmin	
• Add to the business continuity plan as the supervisor of the org by emailing mytraining@wichita.edu	
• If department chair change: email gina.crabtree@wichita.edu to notify of the new chair.	

NEW SUPERVISOR – FIRST WEEK	
ACTION	**DATE COMPLETED**
Introduce supervisor to internal/external staff	
Tour office, including restrooms and break areas	
Explain break room policies (food storage and community utensils)	
Explain break rules, including lunchtime and smoking policies	
Review job description and org chart	
Review telephone, long distance card, fax, e-mail, calendar use	
Review department guidelines	
Explain pay/timekeeping procedures	
Explain attendance guidelines, call-in procedures and requests for time off	
Explain work schedule and office hours	
Explain mail (incoming/outgoing)	
Explain purchase orders	
Explain building access and keys	
Explain office open/close procedures	
Explain office supplies and office equipment	
Explain building safety and emergency preparedness (tornado, fire)	
Explain dress code	
Explain travel procedures	
Explain how/where to save items on computers, networks, etc.	
Enroll supervisor in on-campus trainings such as: Campus Security Authority 2020, FERPA, Care Team, Preventing Harassment & Discrimination, Drug Free workplace training, Banner, Self-service & Reporting services Finances (Registrar), Visa Business Procurement Card Training (Financial Operations), ePAF for Approvers and Originators, ePAF Training II Requisition Approvals, Faculty Search Process (Academic Affairs), PeopleAdmin Training, myPerformance Training (staff reviews), Schedule Building I & II (Registrar), Student Inquiry, Advisor, Permission and Holds (Registrar), SSC Navigate, APS, etc.	
Schedule times for the new supervisor to sit with each department and discuss how they will interact/work together with this department, if applicable	
Record greeting/voicemail on office phone	
Order business cards, name tag, name plate, and/or uniforms, ask them to verify it has the name on it they would like to be called.	
Explain Outlook calendar procedures and set up email signature	
Discuss University and dept. missions	
Ensure supervisor will review WSU policies and procedures (https://www.wichita.edu/about/policy/)	
Share a campus map and show locations relevant to their job or provide services (RSC, Food Court, University Police Dept., etc.)	
Explain annual review process and expectations	
Discuss supervisor's overall first impressions	
Schedule a planning session for annual review process	

NEW SUPERVISOR ORIENTATION – FIRST MONTH	
ACTION	**DATE COMPLETED**
If Faculty: Schedule supervisor and ensure for attendance of Academic Affairs New Chair orientation in August	
All: Complete the online form at wichita.edu/LOrequest to submit a request for the new leader to complete Leader Orientation.	
Meet with the supervisor regularly (weekly/bi-weekly) to ensure they are getting what they need to be successful in their training. Some suggested topics to talk about: • How is training going? • Do you feel you have what you need to be successful in your role? • Do you have questions about your role? • Do you need anything from me?	

NEW SUPERVISOR/NEW EMPLOYEE – FIRST MONTH	
ACTION	**DATE COMPLETED**
Ensure new supervisor has completed the required Preventing Harassment and Discrimination online training	
Verify that supervisor has set up Duo Security	