

## New Employee- Supervisor's Checklist

New employees are a tremendous asset to the University community. The University's employees are our most critical investment in achieving our vision, mission, and goals.

Long term retention of any new employee starts at recruitment. Now that you have your new employee recruited with a planned start date, you want to foster their (and your) success. Use this checklist to ensure that you have all of the needed elements to help get your employee off to the best start possible.

<b>BEFORE THE START DATE</b>	
<b>SCHEDULE AND JOB DUTIES</b>	
<input type="checkbox"/> Call employee following notification from HR to officially welcome employee	<input type="checkbox"/> Confirm start date, place, time, dress code, parking, etc. <input type="checkbox"/> If unfamiliar with campus, mail or e-mail campus map with parking area and building highlighted <input type="checkbox"/> Provide supervisor's contact information <input type="checkbox"/> Confirm with HR that a temporary parking pass has been sent
<input type="checkbox"/> Set up meetings with critical people for the employees' first few weeks and add to new employee's calendar	<input type="checkbox"/> Contact your HR professional and confirm new meeting date and time to complete necessary paper work, and schedule benefits meeting
<input type="checkbox"/> Create agenda/tasks for the employee's first day. Put together <b>WELCOME PACKET</b> from the department and include the information listed on the right:	<input type="checkbox"/> Job description <input type="checkbox"/> Probation information (if appropriate) <input type="checkbox"/> Department/Unit organization chart <input type="checkbox"/> Contact names for the department <input type="checkbox"/> Department/Unit phone/email list <input type="checkbox"/> Mission/vision and guiding principles for UWS and department/unit <input type="checkbox"/> Schedule for first week <input type="checkbox"/> Ongoing Schedule <input type="checkbox"/> Authorization forms when appropriate ( <a href="#">driver authorization</a> , <a href="#">key request authorization</a> , <a href="#">pro-card...</a> ) <input type="checkbox"/> Schedule a campus tour with department member or buddy, add to employee's calendar
<b>SOCIALIZATION</b>	
<input type="checkbox"/> Notify your department of the new hire	<input type="checkbox"/> Send via email to department <input type="checkbox"/> Copy the new employee, if appropriate <input type="checkbox"/> Include start date, what their job will be, and employee biography <input type="checkbox"/> Assign a mentor or buddy, if appropriate

<b>WORK SPACE</b>	
<input type="checkbox"/> Clean the work area	<input type="checkbox"/> Remove any personal items left by predecessor <input type="checkbox"/> Pull together basic office and/or desk supplies <input type="checkbox"/> <a href="#">Order name tag and business cards from University Relations</a>  <input type="checkbox"/> Complete Facilities Management <a href="#">work order</a> for desk/name plate <input type="checkbox"/> Verify working computer
<b>TECHNOLOGY ACCESS AND RELATED</b>	
<input type="checkbox"/> Contact technology services team to have the system set up in advance	<input type="checkbox"/> Order computer, if necessary <input type="checkbox"/> Arrange for phone installation Consider software needs of the job such as: <input type="checkbox"/> Outlook set up <input type="checkbox"/> Access to shared drives <input type="checkbox"/> Daily software needs <input type="checkbox"/> Printer connections <input type="checkbox"/> Departmental portal and network access <input type="checkbox"/> Schedule Commonspot training if applicable
<b>ADDITIONAL:</b> _____	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

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EMPLOYEES FIRST DAY	
<input type="checkbox"/> Welcome them upon arrival	Understand that they may be nervous; try not to overwhelm them with too much too soon. <input type="checkbox"/> Provide overview of the first day and work week
<input type="checkbox"/> Introduce them to department and team members	<input type="checkbox"/> Introduce mentor or "buddy" (if using one) <input type="checkbox"/> Break/lunch areas, where to store personal belongings <input type="checkbox"/> Restrooms
<input type="checkbox"/> Review job description	<input type="checkbox"/> Discuss expectations for job <input type="checkbox"/> Review welcome packet
<input type="checkbox"/> Introduce them to work area	<input type="checkbox"/> Supply them with available keys, or other items to gain access to office <input type="checkbox"/> Safety procedures/policies <input type="checkbox"/> Overview of software and other technology use (calendar system, phone/voicemail, computer, email, internet, our website, shared files/drives etc.) <input type="checkbox"/> Relevant websites <input type="checkbox"/> Show them how to order office supplies <input type="checkbox"/> Show them how to use the copier, and provide copy codes <input type="checkbox"/> If additional technology training is necessary, contact the technology help desk at x8300
<input type="checkbox"/> Review department and/or job classification policies	<input type="checkbox"/> Review schedule, start times/end times and time reporting <input type="checkbox"/> University calendar, holidays and personal holidays <input type="checkbox"/> Process and recording for sick leave, vacation time/request <input type="checkbox"/> Overtime and comp time policies (if appropriate) <input type="checkbox"/> Emergency procedures <input type="checkbox"/> Inclement weather <input type="checkbox"/> Security protocols and building hours <input type="checkbox"/> Dress code <input type="checkbox"/> Phone and computer use <input type="checkbox"/> Department traditions and recognition events <input type="checkbox"/> Online resources for additional information such as the campus directory <input type="checkbox"/> Provide list of current department projects and

	cyclical programs, highlighting roles of other department members
<input type="checkbox"/> Introduce them to the campus	<input type="checkbox"/> Take them on a tour of the campus, thoroughly introduce them their home building <input type="checkbox"/> Show them elevators, stairs, exits, restrooms, break areas, etc. <input type="checkbox"/> Show them how to open/close office (if appropriate) <input type="checkbox"/> Show them mail area <input type="checkbox"/> Introduce them to key departmental people such as mailroom staff, payroll staff, etc. <input type="checkbox"/> Show them where to obtain their ID in the YU <input type="checkbox"/> Show them the Parking services building where they will be issued keys and a parking permit, if applicable
<input type="checkbox"/> Arrange to bring them to lunch on the first day	<input type="checkbox"/> Include other employees if possible
<input type="checkbox"/> Have them complete any required forms with Human Resources	<input type="checkbox"/> Signed contract <input type="checkbox"/> Benefit forms if appropriate <input type="checkbox"/> W4 <input type="checkbox"/> I-9 <input type="checkbox"/> Direct Deposit <input type="checkbox"/> Other: _____
<input type="checkbox"/> Give them their first assignment	<input type="checkbox"/> Make it small and doable so they feel like they have already accomplished something
<input type="checkbox"/> During the first week, meet or touch base with employee <u>daily</u> to answer questions	<input type="checkbox"/> Inquire of first day/first week went <input type="checkbox"/> Make time to listen to any questions <input type="checkbox"/> Encourage them to ask questions <input type="checkbox"/> Explain your work style and discuss how it will fit with the style of the new employee

## New Employee- Supervisor's Checklist

### FIRST THREE MONTHS

Check in with employee to let them know how they are doing and answer questions they may have

Determine performance goals both short term and long term

Classified staff are required to complete a three month review

Additional: \_\_\_\_\_

### FIRST SIX MONTHS

Classified staff are required to complete a six month review

Determine performance goals

Check in with questions

Additional: \_\_\_\_\_

### ANNUALLY

Schedule annual performance review and set performance standards for the upcoming year

Review position description and make appropriate updates

Check in with questions

Additional: \_\_\_\_\_