Farmingdale State College
STATE UNIVERSITY OF NEW YORK

Manager Checklist for New Employees

Employee Name:		Start Date:	
Title:		Department:	
Supervisor:			

PRE-HIRE CHECKLIST

The checklist below will guide you through key tasks to complete **prior to the new hire's first day**. Please note that depending on the type of hire some of the items may or may not be relevant.

Administrative:

☐ *Create a transition plan* for the new hire and those currently handling the tasks of the position. Define a time-line for how each task will transition to the new employee and who will be responsible for training.

☐ *Add new employee to Outlook Calendars* in the work group as needed.

☐ *Update internal communications*, distribution lists, office phone lists, and email lists with the employee's contact info.

Tech:

☐ *Telephone/line* verify their office phone has been activated.

☐ *Establish computer system and security accounts* needed to perform the job.

Workspace:

☐ *Obtain security codes* if needed.

☐ *Order business cards, desk name plates and/ or name badges* if appropriate.

☐ *Prepare workspace*: set-up, clean, neat, and organized for new employee.

Supplies:

☐ *Obtain office supplies, computer, and office keys* if needed.

☐ *Accommodations:* If the employee has requested workplace accommodations, arrange for them in advance, if possible.

☐ *Order uniforms* if applicable.

Work Assignments:

☐ *Plan initial assignments:* As the supervisor, be sure the new hire has the tools and resources to complete their first assignment successfully.

Staffing:

☐ *Identify "work buddy"* someone in the college/ department to serve as an informational resource on policies and procedures.

Human Resources:

☐ **Ensure your new employee has completed the new hire welcome packet online** to facilitate their onboarding.

Communications:

☐ *Call the employee* a day or two before arrival to answer immediate questions and to provide instructions when they arrive on their first day, including location of closest parking lot.

☐ *Notify your department of your new hire* and briefly describe their role on the team.

Other:

☐ _____

☐ _____

☐ _____

☐ _____

FIRST DAY CHECKLIST

The following checklist contains key tasks to help with your new employee's first day acclimation. You may want to ask others on your team to help with some of these tasks.

Introductions

☐ *Greet the employee*, show them their workspace and where to put their personal belongings.

☐ **Introduce new employee to the staff and their roles**, including their assigned "work buddy".

☐ *Lunch:* Make sure new employee knows where they can go for lunch and what others generally do for lunch.

Workplace Orientation

☐ *Verify workspace is ready:* Ensure they have all the equipment and resources needed to do their job.

☐ *Take them on a tour around your office/building,* point out key locations (copier, mail-room, fax machine, office supplies, restrooms, break areas, emergency exits, fire extinguishers, vending machines, Human Resources office, etc.).

☐ *Provide them with facility information* such as keys and security codes.

☐ *Provide an orientation to computer systems;* include log-on, email, security, and calendaring.

☐ *Explain workflow* of the work area, work priorities, phone, mail system, and office equipment.

☐ *Review office procedures* and guidelines (when to take lunch/breaks, unit coverage, and who to call in an unexpected absence).

☐ *If there is a dress code,* review it with the employee. If the position requires a uniform, make sure they have the right sizes.

Administrative Onboarding

☐ *Complete additional forms* specific to the department/position.

☐ *Required training:* Schedule any Right-to-Know or other required training if needed.

Other:

☐ _____

☐ _____

☐ _____

FIRST FEW WEEKS CHECKLIST

WORKPLACE-RELATED INFORMATION:

Functions

☐ *Supplies:* Provide information and instructions on office supplies and equipment.

☐ *Safety:* Provide safety and emergency information and share how to report hazards.

☐ *Meetings & Events:* Provide information about meetings and other events on the employee's calendar (purpose, attendees, what to expect, the employee's role).

Culture

☐ *Share unwritten rules and traditions* with employee (Casual Friday, summer hours, birthday celebrations, etc.)

☐ *Culture:* Discuss your management style and the department's culture.

☐ *Consider developing a glossary* of terms and acronyms as a reference guide.

Role

☐ *Set up for success:* Assign the employee something they can accomplish relatively quickly and easily to help build an initial sense of contribution.

☐ *Set priorities*. Discuss what is important to overall objectives. This will help the new employee prioritize tasks.

☐ *Ensure that the new employee receives a tour of campus* and meets appropriate colleagues around campus that they may be working with frequently.

CAREER-RELATED INFORMATION:

Career Development

☐ *Expectations:* Determine performance standards by reviewing position responsibilities, setting performance expectations, success measures, and clarifying the process for permanent and continuing employment.

☐ *Training:* Identify training resources and opportunities for the employee.

☐ *Professional Development:* Introduce the employee to resources such as professional development workshops and educational benefits.

Other:

☐ _____

☐ _____

☐ _____

☐ _____

FIRST 90 DAYS CHECKLIST

☐ *Provide regular feedback* during the first 90 days and beyond.

☐ *Training:* Review and direct the employee to training opportunities.

☐ *Follow up with employee* periodically on any questions or concerns they may have.

☐ *Foster Belonging:* Check if the employee is fully engaged and sees themselves as a valued contributor.

QUESTIONS TO ASK DURING NEW HIRE CHECK-IN MEETINGS

- How is your job going?
- Is it what you expected when hired?
- Any surprises? If yes, what…
- Has the training been helpful?
- What training would you add?
- Has your buddy been helpful?
- Any changes you would suggest for the buddy program?
- Do you have all the work tools/resources you need?
- Do you know where you stand in terms of your progress since you started work?
- How are your relationships with your co-workers?
- Is there room for improvement in the department?
- Do you feel you have been able to manage your work/life needs since starting this job?
- Was your Onboarding appointment helpful? Is everything OK with your benefits and pay?
- Any questions/anything unclear?