

## Manager Checklist for New Employees



Congratulations on hiring your new employee. The following checklist is designed to help you prepare for your new hire's onboarding to UMMS through their first six months of employment. Be sure to:

- Provide your new employee with ongoing coaching and feedback to foster engagement;
- Encourage your new employee to enjoy a rewarding career experience by gaining new skills and finding ways to contribute to their customers and the University's mission and vision.

| Prior to Employee's 1 <sup>st</sup> Day   | Employee - 1 <sup>st</sup> Day   | Employee - 1 <sup>st</sup> Week  | Employee - 2 <sup>nd</sup> Week   |
|---|--|--|---|
| <input type="checkbox"/> Call or email employee after offer is accepted to welcome and confirm start date.                                      | <input type="checkbox"/> Ensure ID Badge and Parking Tag has been received, as well as special department access.  | <input type="checkbox"/> Review job training timeline.   | <input type="checkbox"/> Discuss culture and expectations (mission, vision, core values, high performing organization). |
| <input type="checkbox"/> Schedule key meet and greets with appropriate senior leaders, staff and stakeholders.                                  | <input type="checkbox"/> Review telephone, copier and fax use and department. Review work schedule and dress code.   | <input type="checkbox"/> Provide HR Direct overview: time reporting, review pay weeks, how to view and print an online paycheck/ payroll pay advice, location of job aids. | <input type="checkbox"/> Familiarize with organizational structure, who's who.  |
| <input type="checkbox"/> Prepare work space to be ready for first day: supplies, computer equipment, software, and phone.                       | <input type="checkbox"/> Review job description, duties/ responsibilities and goals; provide clear expectations for the first 30, 60, 90 days.                           | <input type="checkbox"/> Review department specific goals, standard operating procedures (SOP's), department policies and reading material for review.                     | <input type="checkbox"/> Provide overview of clients/ customers.  |
| <input type="checkbox"/> Send "Account Request Application" for logon to IT and access to appropriate drives.                                   | <input type="checkbox"/> Assist with password and Outlook signature set up, and mapping of drives and printer.   | <input type="checkbox"/> Provide organizational charts and program overview.   | <input type="checkbox"/> Continue meet and greets.  |
| <input type="checkbox"/> One week prior to start date, send an email to department staff notifying of new hire, background and welcome.         | <input type="checkbox"/> Confirm that UMMS user account has been set up. Review how to obtain IT assistance through the helpdesk.  | <input type="checkbox"/> Enroll employee in any required, job related training (i.e. Summit, BuyWays, Expense Module, etc.).   | <input type="checkbox"/> Provide an overview of communication protocols/methods.  |
| <input type="checkbox"/> Identify and assign a "buddy", (a co-worker) assigned to help answer questions about work for the first 3 to 6 months. | <input type="checkbox"/> Provide department list including titles, phone numbers and email addresses.  | <input type="checkbox"/> Identify how to submit requests for time off, mileage reimbursement, professional development, supplies, conference rooms, etc.                   | <input type="checkbox"/> Provide operational manual/procedure guide if available.                                       |
| <input type="checkbox"/> Order business cards if appropriate.   | <input type="checkbox"/> Introduce to co-workers and "buddy".  | <input type="checkbox"/> Add employee to appropriate distribution lists.   |   |
|   | <input type="checkbox"/> Provide tour of department and key facilities: cafeteria, restrooms, kitchen area, conference rooms, supply area, stairways, ATM, parking, etc. | <input type="checkbox"/> Schedule regular supervision meetings.  |   |
|   | <input type="checkbox"/> Review what to do in an emergency situation (where to exit, where to meet).   | <input type="checkbox"/> Provide prescheduled training dates.  |   |
|   |  | <input type="checkbox"/> Review handling of confidential information including PHI and PII.  |   |

Turnover to Continue

| Employee – 30 Days  | Employee – 90 Days  | Employee – 6 Months  | Employee – 365 Days and Beyond  |
|---|---|--|---|
| <input type="checkbox"/> Conduct informal 30 Day Mgr. Evaluation/ Performance Review.   | <input type="checkbox"/> Conduct informal 90 Day Mgr. Evaluation/Perform Review.  | <input type="checkbox"/> Complete 6 Mo. Probation Review and determine if employee is going to be retained.  | <input type="checkbox"/> Conduct Annual Performance Evaluation.                   |
| <input type="checkbox"/> Employee Relations conducts 30 Day Check In. Provide your feedback.  | <input type="checkbox"/> Employee Relations conducts 90 Day Check In. Provide feedback.*  | <input type="checkbox"/> Conduct individual and/or group developmental activity.   | <input type="checkbox"/> Continue individual and/or group developmental activity. |
| <input type="checkbox"/> Conduct training needs assessment.   | <input type="checkbox"/> Review results of training needs assessment and develop IDP w employee.  | <input type="checkbox"/> Continue IDP Plan with Ongoing Training Includes Hard Skill, Soft Skill, Onboarding Skill, Professional Development Training Offerings. |   |
| <input type="checkbox"/> Outline importance and relationship of the employee's job to the mission and priorities of the organization. | <input type="checkbox"/> Provide information about training opportunities.  | <b>Employee - 365+ Days</b>  |   |
| <input type="checkbox"/> Provide employee with knowledge of organizational resources (historical files, knowledge management system). | <input type="checkbox"/> Arrange for new hire to meet senior level official to hear first hand about the agency's strategic priorities. | <input type="checkbox"/> Reinforce UMMS mission and culture.   |   |
| <input type="checkbox"/> Discuss business continuity, shelter-in-place and emergency plans.   | <input type="checkbox"/> Assess orientation process and provide feedback per the Hiring Manager Survey.                                 | <input type="checkbox"/> Communicate employee's value to mission accomplishment. Also, help employee understand their role and department.                       |   |
| <small>*Provide Employee Relations feedback if concerns that new hire will need 5 month check-in period.</small>                      |   | <input type="checkbox"/> Conduct periodic performance checks and discussions.  |   |
|   |   | <input type="checkbox"/> Provide training to develop skill or insight into workings of organization based on IDP.  |   |
|   |   | <input type="checkbox"/> Ensure mandatory compliance trainings are completed.  |   |
|   |   | <input type="checkbox"/> Encourage employee to provide job insight into how to make institution more effective and efficient.                                    |   |