

Manager Checklist for New Employees

| EMPLOYEE INFORMATION | | |
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| Name: | Start Date: | |
| Position: | Manager: | |
| PRIOR TO EMPLOYEE'S FIRST DAY | | |
| <input type="checkbox"/> Call to officially welcome the new hire to Yale after confirmation of acceptance. | | |
| <input type="checkbox"/> Send an informal announcement (via e-mail) to the department announcing the new employee. | | |
| <input type="checkbox"/> Prepare the employee's first day and first week agenda. | | |
| <input type="checkbox"/> Schedule uninterrupted time (sets tone) to meet with new employee and orient them to your department | | |
| <input type="checkbox"/> Prepare the new employee's work space with appropriate supplies and make sure that it is clean and ready. | | |
| <input type="checkbox"/> Set up new employee's computer, printer, phone | | |
| <input type="checkbox"/> Have key items (set up) on computer (e.g. Yale website, Yale phonebook, Learning Center website, HR website) | | |
| <input type="checkbox"/> Order supplies – paper, pens, keys, business cards (if applicable) | | |
| <input type="checkbox"/> Assign peer "mentor" employee(s) to answer general questions. Review objectives. | | |
| <input type="checkbox"/> Determine location for "First Day" welcome lunch with new employee, preferably with yourself or another employee. | | |
| EMPLOYEE'S FIRST DAY | | |
| <input type="checkbox"/> Welcome new employee. | | |
| <input type="checkbox"/> Greet the new employee at the designated time and location – Discuss Day 1 agenda. | | |
| <input type="checkbox"/> Introduce new employee to peer mentor. | | |
| <input type="checkbox"/> Take new employee to lunch, and/or arrange for peer "mentor" to do so. | | |
| INTRODUCTION TO DEPARTMENT | | |
| <input type="checkbox"/> Introduction to the department including: | <ul style="list-style-type: none"> • Department mission and strategic plan • Relation to other departments • Organization of department – Organizational Chart, if available | |
| UNIVERSITY AND DEPARTMENT POLICIES | | |
| <input type="checkbox"/> Review key policies. (Focus is on department) | <ul style="list-style-type: none"> • Lateness policy • Reporting absence • Vacation and sick leave • Holidays • Time reporting (time cards, if applicable) • Overtime • Performance reviews | <ul style="list-style-type: none"> • E-mail and Internet use • Security • Confidentiality • Safety • Emergency procedures • Injury prevention • Dress code |
| INTRODUCTION TO THE JOB | | |
| <input type="checkbox"/> Review general information. | <ul style="list-style-type: none"> • Office/desk/work station • Work hours, breaks, mealtimes, etc. • Keys (if applicable) • Building access/security • ID badges and parking • Business cards (if applicable) • Handling confidential information • Conference rooms | <ul style="list-style-type: none"> • Staff list • Important telephone numbers, including new employee's • Mail (incoming and outgoing) • Expense reports, if applicable • Purchase requests/P-Card, if applicable • Shipping (FedEx, DHL, and UPS) |

INTRODUCTIONS AND TOURS

Introduce new employee to department staff and key individuals during tour.

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| <input type="checkbox"/> Tour facility, including: | <ul style="list-style-type: none"> • Restrooms • Mail rooms • Copy machine • Fax machine | <ul style="list-style-type: none"> • Bulletin board • Parking • Printers • Office supplies | <ul style="list-style-type: none"> • Water cooler • Coffee area • Vending machines • Emergency exits |
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POSITION INFORMATION

- Review job description, responsibilities, and performance expectations/goals.
- Review competencies necessary for success at Yale and in department.
- Review initial job assignments and development plans. Include training opportunities.
- Facilitate enrollment in required training courses.

COMPUTERS AND TELEPHONE

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| <input type="checkbox"/> Hardware and software reviews, including: | <input type="checkbox"/> E-mail or Outlook | <input type="checkbox"/> Shared server (if applicable) | <input type="checkbox"/> How to set up voicemail |
| | <input type="checkbox"/> Calendar software | | <input type="checkbox"/> How to use telephone system |

EMPLOYEE'S FIRST WEEK

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| <input type="checkbox"/> Have new employee meet for 30 minutes, one-on-one, with members of department (or key individuals) to discuss: | <ul style="list-style-type: none"> • Job duties • How job roles interact • How they might work together in the future |
| <input type="checkbox"/> Schedule weekly/bi-weekly meetings with new employee | |
| <input type="checkbox"/> Schedule 30-day meeting with new employee | |
| <input type="checkbox"/> Schedule 90-day meeting with new employee | |

EMPLOYEE'S FIRST MONTH

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|---|---|
| <input type="checkbox"/> Meet with new employee at the end of first 30 days to: | <ul style="list-style-type: none"> • Review observations, issues and priorities • Continue to clarify roles, responsibilities, and expectations, as needed • Ensure any mandatory training has been completed • Establish a plan for professional development and encourage training opportunities through Yale Learning Center. • Answers questions and concerns. |
| <input type="checkbox"/> Meet with peer mentor to review any concerns or needs (without violating the parameters of the peer relationship.) | |

Resources for Managers

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|-----------------------|-----------------|----------|-------|----------|
| Yale ID Center | (Central) | 432-0165 | (Med) | 785-4286 |
| Parking | (Central) | 432-9790 | (Med) | 785-6456 |
| ITS/Telecom Help Desk | (Central) | 432-9000 | (Med) | 785-3200 |
| University Payroll | (Central & Med) | 432-5408 | FAX | 432-6662 |