

NEW EMPLOYEE – MANAGER’S CHECKLIST

HR Contact Information

Online Communication

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Location

Administration Room 252



Courage. Life of the Mind. Equity. Community. Resilience





New employees are a tremendous asset to the San Francisco State 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.

BEFORE THE START DATE	
SCHEDULE AND JOB DUTIES	
<input type="checkbox"/> Call Employee <input type="checkbox"/> Email Employee	<input type="checkbox"/> Confirm start date, place, time, dress code, etc. <input type="checkbox"/> Email follow-up on I-9 (initiates Internet ID), W4. <input type="checkbox"/> Give new employee their SFSU ID number.
<input type="checkbox"/> Set up meetings with critical people for the employees first few weeks. <input type="checkbox"/> Add to new employee’s calendar <input type="checkbox"/> Add to department listserv <input type="checkbox"/> Send informal announcement of new employee to department <input type="checkbox"/> Schedule time in your calendar to meet with new employee	
<input type="checkbox"/> Create action plan/tasks for the employee’s first day.	If appropriate.
<input type="checkbox"/> Put together welcome packet from the department and include:	<input type="checkbox"/> Position description <input type="checkbox"/> Welcome letter <input type="checkbox"/> Job manual or department handbook (if available) <input type="checkbox"/> Contact names for the department <input type="checkbox"/> Schedule for first week <input type="checkbox"/> Department/unit organization chart <input type="checkbox"/> Department/unit phone/email list <input type="checkbox"/> Map of campus with building highlighted <input type="checkbox"/> Parking and transportation information <input type="checkbox"/> Probation Review Process <input type="checkbox"/> Mission/vision and guiding principles for SF State

NEW EMPLOYEE – MANAGER’S CHECKLIST

SOCIALIZATION

- Notify your department of the new hire
- Send via email to department
- Cope the new employee, if appropriate
- Include start date, what their job will be, and employee bio

HUMAN RESOURCES

- Contact your HR professional
- Ensure ETRAC is created
- Obtain benefits packet and information
- Determine needed payroll information
- Submit payroll documentation

WORK SPACE

- Clean the work area
- Pull together basic office and/or desk
- Have key made/order card access (if appropriate)
- Verify working computer (if appropriate)
- Order business cards, name tag, and name plate (if appropriate)
- Provide basic office supplies

TECHNOLOGY ACCESS AND RELATED

- Order computer (if needed)
- Contact computer tech team to have the system set up in advance
- Consider software needs of the job such as:
 - Calendaring system
 - E-mail platform
 - Daily software needs
 - Printer connections
 - Departmental portal and network access

TRAINING/DEVELOPMENT

- Enroll the employee in the New Employee Onboarding.
- Arrange pertinent trainings required for the job. Examples could include:
 - PeopleSoft
 - HIPAA
 - Skillport
 - Specialized software
 - Safety
 - Stretch break software

Additional: _____

EMPLOYEE'S FIRST DAY

- | | |
|---|--|
| <input type="checkbox"/> Welcome them upon arrival (understand that they may be nervous; try not to overwhelm them) | |
| <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 |
| | <input type="checkbox"/> Restrooms |
| | <input type="checkbox"/> Building access cards/keys |
| <input type="checkbox"/> Provide welcome packet and take time to discuss contents | <input type="checkbox"/> Review contents of welcome packet and give them time to look through it on their own |
| | <input type="checkbox"/> Onboarding schedule and timeline |
| | <input type="checkbox"/> Sign up for New Employee Orientation |
| | <input type="checkbox"/> Start times/end times |
| | <input type="checkbox"/> Relevant websites |
| <input type="checkbox"/> Introduce them to work area | <input type="checkbox"/> Supply them with key(s), ID, or other items to gain access to office |
| | <input type="checkbox"/> Show them how to order office/desk supplies |
| | <input type="checkbox"/> Overview of software and other technology use (calendar system, phone/voicemail, computer email, internet, department portal, etc.) |
| | <input type="checkbox"/> Introduce them to the office computer network (shared files and/or drives) |
| <input type="checkbox"/> Introduce them to the department/unit | <input type="checkbox"/> Take them on a tour of the building |
| | <input type="checkbox"/> Show them elevators, stairs, restrooms, kitchen area, break room. |
| | <input type="checkbox"/> Introduce them to key department people, such as mailroom staff, payroll staff, etc.) |
| | <input type="checkbox"/> Show them how to open/close office |
| | <input type="checkbox"/> Provide tour of different area(s) of campus, as appropriate to their position |
| <input type="checkbox"/> Arrange to bring them to lunch on the first day | <input type="checkbox"/> Include other employees if possible |

Review position description

Process and recording fro sick leave, sick child, and vacation/requests

University calendar, holidays and religious holidays

Dress code

Emergency procedures
school closings

Security protocols and building hours

FIRST WEEK

Show them training schedule

Pre-schedule trainings if possible

Talk about overall training timing

Technology check-in

Verify working computer

Department access/portal

Printer hook-up

Software needs

E-mail

Calendar

Phone/voicemail

Review org chart for the department

Meet or touch base with new employee daily to answer questions

Inquire how first week went

Make time to listen to any questions

Encourage them to ask questions

Explain your work style and discuss how it will fit with the style of the new employee

Provide list of current department projects and cyclical programs, hihglighting roles of other department members

Discuss University employee websites and resources

Employee Online Directory

SF Gateway

Employee Wellness Program

Employee Assistance Program

Disability Programs and Resource Center(DPRC)

Recreation center

Library

Training and Organization Development

Vechicle and Travel Policy

Online HIPAA training information

<input type="checkbox"/> Complete required personnel paperwork	<input type="checkbox"/> Ensure that employee has completed required paperwork
	<input type="checkbox"/> I-9
	<input type="checkbox"/> W4
	<input type="checkbox"/> HR Information Form
	<input type="checkbox"/> HIPAA/FERPA data privacy (if appropriate)
<input type="checkbox"/> Discuss training and policies and procedures	<input type="checkbox"/> Who to contact
	<input type="checkbox"/> Where to go with questions
	<input type="checkbox"/> Online options
Additional: _____	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

FIRST MONTH	
<input type="checkbox"/> Weekly or bi-weekly meetings with new employee	<input type="checkbox"/> Answer their questions and help foster engagement with the organization
<input type="checkbox"/> Check in about benefits and pay statement	<input type="checkbox"/> Ensure that they gave access
	<input type="checkbox"/> Answer any questions that they have
	<input type="checkbox"/> Ensure attendance of benefit and retirement tutorial
<input type="checkbox"/> Ensure participation in the New Employee Programs	<input type="checkbox"/> Check on timing of first session
	<input type="checkbox"/> Inquire how first session went, if attended
<input type="checkbox"/> Discuss process for reviews	
<input type="checkbox"/> Review performance standards	
<input type="checkbox"/> Review position description	
<input type="checkbox"/> Discuss job rules and regulations	
<input type="checkbox"/> Check in on mentor/buddy	<input type="checkbox"/> Talk with mentor/buddy (if appropriate)
	<input type="checkbox"/> Talk with new employee about mentor/buddy relationship (if appropriate)

Additional: _____

FIRST THREE (3) MONTHS

Ensure participation in New Employee Program

Inquire how first session went

Performance appraisal

Can be informal

Check in with employee to let them know how they are doing

Determine performance goals

Both short term and long term

Check in with questions

Additional: _____

FIRST SIX (6) MONTHS

Performance appraisal

More formal

Document for probation purposes

Determine performance goals (continue)

Both short term and long term

Check in with questions

Additional: _____

AFTER PROBATIONARY PERIOD

Celebrate the end of the probationary status

Schedule annual performance review

Check in with questions

OVERVIEW CHECKLIST FOR NEW EMPLOYEE

TO BE FILED IN DEPARTMENTAL PERSONNEL FILE BY THE MANAGER

Employee _____

School/Division _____

Supervisor _____

Department _____

INFORMATION COVERED IN NEW EMPLOYEE ORIENTATION

- The History of SF State
- Diversity
- SF State Strategic Plan
- Campus Administration & Leadership
- Academic Colleges
- Parking & Transportation
- Employee Assistance Programs
- Employee Advocacy Programs
- Achieving Excellence Training Programs
- Campus Emergency Preparedness
- Worker's Compensation & Risk Management
- Health, Dental and Vision Plans

TOPICS TO BE COVERED BY DEPARTMENT/SUPERVISOR

Supervisors: check off items as you address them with your new employee.

- Terms of employment (employment program/probationary period/salary)
- Job duties and performance expectations
- Performance appraisals
- Work schedules, breaks and overtime
- Time and leave reporting
- Labor contract/dues obligation (bargaining unit)
- Professional Staff Development Programs
- Paydays and how to arrange direct deposit

Review job description

Discuss job rules and regulations

CHECKLIST FOR NEW EMPLOYEE'S BUDDY

BEFORE NEW TEAM MEMBER STARTS

- Work space clean, including computer, phone, trash can, etc. has been set up
- E-mail address is set up (through IT)
- Set up mailbox – if one exists
- Get copy of departmental handbook (if applicable)
- Arrange for any welcoming items or events (door sign, welcome reception, etc.)

WEEK ONE

- Meet and greet on day one
- Walk around and tour areas of the facility
- Show work space/desk
- Assist new employee with any questions they may have
- Introduce new employee at meetings, breaks, lunch, etc.
- Assist the new hire with understanding of acronyms typically used in your department

DURING THE REMAINDER OF THE 1ST MONTH

- Discuss job rules and regulations

NOTES

SAMPLE NEW EMPLOYEE CHECK-IN MEETING QUESTIONS

Name_____

Today's Date_____

Position_____

Start Date_____

(To be completed by the manager)

SAMPLE QUESTIONS

- How is your job going?
- Is it what you expected when you were hired?
- Any surprises? If yes, what were they?
- Has training been helpful?
- What training would you add?
- Has your buddy been helpful?
- Can you suggest any changes for the Buddy program?
- Do you have all the equipment and/or work tools you need?
- Do you know where you stand in terms of your progress since you started working?
- How are your relationships with your co-workers?

- Do you have suggestions on how to improve the New Employee Onboarding presentation?
- Do you have suggestions on how we could improve our work across the department?
- Are there any questions you still have/is anything unclear?
- Is there something we should be providing to new employees that we have missed?
- Do you feel out of the loop about anything?
- Is there anything that you need and to which you don't have access to?
- Do you have any general suggestions?
- Do you have any general work needs that haven't been met?
- Is there anything you would like to tell me that I have not asked you?

NOTES:



-New Employee Announcement Template-

[To coworkers from supervisor]

Dear [department name] team:

I am delighted to announce that [new employee's name] will be joining our department as [job title of new employee] on [start date].

[Name of "Buddy"] will be assigned to help [new employee's first name] during the orientation process. However, all of us will be responsible for helping [new employee's first name] become a productive member of our team.

Please join me in extending a heartfelt welcome to [new employee's first name] on [his/her] first day.

Sincerely,

[Manager's/Supervisor's Name]



-New Employee Welcome Letter Template-

Dear [Employee's first name],

Welcome to San Francisco State University and the [department name]! I am delighted you are joining us as new [new employee's job title]. Your role is critical in fulfilling the mission of our department and SF State.

Please arrive at [time] on [date] at [location] and ask for [designated staff member]. You can park at [location] and, if you don't have a vehicle, here is a schedule of public transportation that may be helpful [provide a link or include information in the package about public transportation]. Don't forget to bring [necessary documents] to complete the I-9 and W-4 forms. You can expect to dress [describe appropriate attire], and for lunch, we usually [describe typical lunch routine dining options].

The enclosed information is designed to serve as an introduction to [department name] and provide resources that will help you make a smooth transition into your new role.

The [department name] team is here to support your transition so, please know that you can call on any of us to assist you. We are looking forward to you joining our team and your success at SF State.



Dear Manager,

Congratulations on the successful hire of your new colleague. We understand that this is a new beginning for both you and your colleague, and the possibilities are endless! The key to success of your new colleague is, in part, providing a suitable on-boarding experience. Human Capital Institute research shows that providing on-boarding throughout an employee's first 90 days greatly increases the likelihood of employee retention and productivity.

We are certain that you have already completed a number of orientation activities, and in addition to those, we would like to provide you with a few more ideas and tools to help you welcome, orient, and retain your new employee.



What is On-boarding?

- It's a support process designed to manage a variety of tasks and requirements initiated once a new hire has accepted a position.
- It's a supplement to the existing orientation process that is designed to provide specific and customized information about the university culture and tools to help the new employee navigate and be successful at SF State.
- It's a way to get your newly hired talent up to speed with the policies, processes, culture, expectations, and day to day responsibilities of your department/unit.
- It's a way of making newcomers to the environment feel welcomed and excited, confirming for them the reasons they joined your department/unit and SF State, especially in the early days of the transition and at the onset of new challenges.

An effective on-boarding process:

- Builds SF State's and your department/unit's reputation for being a thoughtful employer, with great training, clear leadership, and a strong organization.
- Helps to retain your senior staff members
- Reduces high turnover costs
- Supports new colleagues and moves them to efficient productivity levels quickly
- Builds better team relationships across the department/unit