

## **Manager & Department Checklist for New Employees**

Name: \_\_\_\_\_ Position: \_\_\_\_\_

Employee Start Date: \_\_\_\_\_ Department: \_\_\_\_\_

New employees are a tremendous asset to the Stockton 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.

**\*Please note these are suggested guidelines/best practices and are not required by the University. The guidelines are also position dependent and won’t fit every job description; therefore, use the suggestions below as you see appropriate.**

### **PRIOR TO EMPLOYEE START DATE**

<p><b>Work with Human Resources to complete the hiring process:</b></p> <ul style="list-style-type: none"> <li>• Notify Talent Acquisition via email of the candidate you have chosen <span style="float: right;"><input type="checkbox"/></span></li> <li>• Log in to the PageUp system and change the individual’s status to “Hired” <span style="float: right;"><input type="checkbox"/></span></li> <li>• Change status of those interviewed to “interviewed” in the PageUp system <span style="float: right;"><input type="checkbox"/></span></li> </ul>
<p><b>After Candidate has officially accepted the job offer:</b></p> <ul style="list-style-type: none"> <li>• Communicate an announcement of the new employee to unit staff (and the University if applicable) <span style="float: right;"><input type="checkbox"/></span></li> <li>• If personal email is available, contact new employee to congratulate them on their new position and possibly provide a welcome letter. (See attached template) <span style="float: right;"><input type="checkbox"/></span></li> </ul>
<p><b>Organize your employee’s new workspace:</b></p> <ul style="list-style-type: none"> <li>• Submit a <a href="#">work order</a> to arrange painting, custodial, furniture, etc. <span style="float: right;"><input type="checkbox"/></span></li> <li>• Order nameplate/sign for employee’s office (if they have one), business cards, and nametag <span style="float: right;"><input type="checkbox"/></span> <ul style="list-style-type: none"> <li>- <i>Communicate with employee to verify the preferred name for these items</i></li> </ul> </li> <li>• Arrange for computer, printer, telephone, voicemail, and any software installation needed. <span style="float: right;"><input type="checkbox"/></span> <ul style="list-style-type: none"> <li>○ The <a href="#">Purchasing department</a> (ext.4325) can assist with state contractors for specific software needed for your department and <a href="#">ITS help desk</a> (ext. 4309) can provide assistance with the installation</li> </ul> </li> <li>• Verify that network connectivity is available in the work location. Notify <a href="#">ITS help desk</a> (ext. 4309) if a network port will be needed or an existing port will need to be relocated <span style="float: right;"><input type="checkbox"/></span></li> <li>• Notify <a href="#">Joe Loefflad</a> (ext. 4643) to request workstation login setup and printing access <span style="float: right;"><input type="checkbox"/></span></li> <li>• Provide basic office supplies or equipment needed to get the employee started <span style="float: right;"><input type="checkbox"/></span></li> </ul>
<p><b>Prepare agenda for new employee’s first day and week. The agenda could have the following information as a starting point:</b></p> <ul style="list-style-type: none"> <li>• Schedule time to spend with your new employee during the first week <span style="float: right;"><input type="checkbox"/></span></li> <li>• Inform employee of their first pay date <span style="float: right;"><input type="checkbox"/></span></li> </ul>

<ul style="list-style-type: none"> <li>• Identify meetings (staff, 1:1, etc.) that new employee should attend</li> <li>• Identify people for new employee to meet during first week</li> <li>• Determine overview for first workweek</li> <li>• Determine overview of goals to be achieved during the first 2-4 months</li> <li>• Determine if the employee should be registered for any specific training</li> <li>• Determine if the employee may need technology specific access (Banner, e-print, Discoverer)</li> <li>• Identify initial work assignment for new employee to begin</li> <li>• Determine if your new employee should have a buddy/mentor</li> </ul>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<p><b>Put together a welcome packet from the department, this might include:</b></p> <ul style="list-style-type: none"> <li>• Welcome letter</li> <li>• Position description</li> <li>• Any pertinent documents, links or resources your department uses (if available)</li> <li>• Contact names for the department (i.e. emails, Ext. etc.)</li> <li>• Department's mission &amp; vision</li> <li>• Department/ Unit Organizational chart</li> </ul>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

**ORIENTATION**

<p><b>Employee's First Day</b></p> <ul style="list-style-type: none"> <li>• Please note that the employee will be in New Hire Orientation for most of the first day of work. <b>However</b>, please make sure you, or someone you have previously selected from your department, meets the employee in the campus center after HR has conducted the campus tour. The tour is scheduled to end by 2:30pm. Click <a href="#">here</a> to view New Hire Orientation Schedule.</li> </ul>
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**ON THE EMPLOYEE'S FIRST FULL WORKDAY**

<p><b>Meet with the new employee to discuss specific university and department protocol such as, but not limited to:</b></p> <ul style="list-style-type: none"> <li>• Discuss any questions from the welcome packet your department may have put together</li> <li>• Discuss the agenda you put together prior to the employee's first day</li> <li>• Dress code</li> <li>• Work hours, office hours, lunch, and if the department has specific break times</li> <li>• Probationary period, overtime policy (if applicable to the employee's classification)</li> <li>• Customer service expectations</li> <li>• Train new employee on completing bi-weekly timesheets &amp; approval process (if applicable)</li> <li>• Payroll schedule</li> <li>• Process for requesting time off or reporting an absence (calling out)</li> </ul>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<p><b>Introduce new employee to all members of the department</b></p>	<input type="checkbox"/>
<p><b>Submit form(s) for technology access. Please note new employee email should be created during the Onboarding process, before or on the first day of work. Use the links below to request additional technology access.</b></p> <ul style="list-style-type: none"> <li>• <a href="#">Banner</a></li> </ul>	<input type="checkbox"/>

<ul style="list-style-type: none"> <li>• <a href="#">Account Request Form</a></li> <li>• <a href="#">Pcard Request form</a></li> <li>• <a href="#">Bank Of America Works user Agreement</a></li> <li>• Share and arrange for training offered by various departments (i.e. Procurement, Disbursement Services, New Manager Orientation, ITS, etc.)</li> <li>• Request swipe card access</li> </ul>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<p><b>Explain to new employee any policies on use of email, internet, voicemail, and any other type of communication</b></p> <ul style="list-style-type: none"> <li>• Share appropriate email signature <a href="#">template</a> for your department</li> <li>• Provide employee with instructions on how to set up voicemail (please see attached)</li> <li>• Discuss sending interoffice and regular mail and location of department mailboxes (if applicable)</li> <li>• Work with ITS for help with setting up programs on electronic devices such as cellphones and laptops</li> </ul>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

**DURING NEW EMPLOYEE'S FIRST MONTH**

<ul style="list-style-type: none"> <li>• Set up one-on-one meetings with employee and any other pertinent staff members</li> <li>• Meet regularly, answer questions and ensure that new employee is becoming acclimated to the department and position responsibilities</li> </ul>	<input type="checkbox"/> <input type="checkbox"/>
<p><b>Review information regarding Performance review process (Contact OHR if you are unsure of the appropriate form to use)</b></p> <ul style="list-style-type: none"> <li>• Classified staff are evaluated using the electronic Performance Appraisal Review* (<a href="#">ePAR</a>).  *Please note that ePAR is dependent on date of hire and it's in addition to the Working Test Period. Contact <a href="#">Tristan Stoltzfus</a> for more information on ePAR</li> <li>• Unclassified AFT Professionals and Faculty are evaluated per the AFT contract requirements.</li> <li>• Managers are evaluated using the Manager Evaluation Review (MER). The evaluation cycle runs from July through June.</li> <li>• Arrange training for supervisors/managers who will be performing evaluations.</li> </ul>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>

**DURING NEW EMPLOYEE'S FIRST 2-6 MONTHS**

<ul style="list-style-type: none"> <li>• Review goals set at the start of employment, determine progress and provide support needed</li> <li>• Complete probationary Review (120-day evaluation) if required by classification</li> </ul>	<input type="checkbox"/> <input type="checkbox"/>
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