

New Employee Checklist for Supervisor

A checklist for supervisors to welcome their new employee to UMKC.

Employee Information

Employee Name: _____ Position: _____

Start Date: _____ Orientation Date: _____

Supervises Others: Yes No

Before Employee Start Date

- Send Employee Welcome Post Card (provided by HR).
- Send Employee Welcome Email
Include:
 - General welcome to the department – include a link to department website
 - Agenda for the employee's first day, including directions on where to go on the first day or after orientation ends
 - Dress Code for department
- Email Department of the new hire. Include start date, employee's role, and bio. Copy the new employee, if appropriate.
- Create a list of critical people the employee needs to meet during their first few weeks. Set up meetings with those individuals, or provide the list to new employee for them to set meetings up once they begin working.
- Plan the employee's first assignment.
- If you are not able to be with the employee often, select another employee to act as a mentor/buddy for the new employee to provide guidance for them as they get settled.
- Clean the new employee's work area, set up cubical/office space with supplies. Also make sure the IT equipment (computer, printer, monitor, etc.) and phone is ready for the employee.
- Order business cards and name plate.
- Add employee to relevant email lists.
- Add regularly scheduled staff and department meetings to employee's calendar.

Employee's First Day

- Remember that the new employee might attend Orientation on their first day. If they are at Orientation, they won't be done until around noon. If there is no orientation scheduled for the employee's first day, they will report to HR at 9am to complete their hire paperwork and then they will report to the department.
- Give a warm welcome and discuss the plan for the first day, for example take the employee out to lunch.

- Tour the employee's assigned work space.
- Provide necessary keys to employee, keys for the office, keys for their desk, etc.
- Tour the department and building, be sure to also explain where restrooms and break areas are located. Also during the tour, introduce the new employee to other staff members.
- Introduce the new employee to the person you have identified as a mentor/buddy if appropriate.
- Review department (or office's) purpose, organizational chart and goals.
- Review job description, expectations with employee, and how the employee's job supports the department goals.
- Review office policies and procedures including:
 - Working hours
 - Telephone, email, and internet use
 - Department and/or building specific safety and emergency information
 - Office Organization (files, supplies, etc.)
 - Office Resources
 - Staff meetings
 - List of individuals to meet with during upcoming weeks
 - Accountability
 - Confidentiality
 - Ethics

During Employees First Week

- Give employee their initial assignment. (make it something small and doable).
- Debrief with employee after they attend initial meetings and trainings and begin working on initial assignment. Continue to touch base briefly each day.
- Explain the performance appraisal and goal setting process.
- Review the process related to the probationary period.
- Arrange for a personal welcome from the unit leader.
- Ensure the employee has fully functioning computer and access and understands how to use them.
- Clarify any performance expectations or policy questions that you have with your supervisor or HR.
- Review [UMKC's Mission, Vision and Values](#) and discuss how your department supports them.
- If the employee is a supervisor, review list of direct reports with employee. Have the employee:
 - Review list of direct report positions, including duties and responsibilities of each one.
 - Expectations for Direct Reports – if none are set up, have employee create them. If there are already expectations, have employee review and edit to fit the expectations they have of their direct reports.

Employees First 30 Days

- Schedule and conduct regularly occurring one-on-one meetings.
- Continue to provide timely, ongoing and meaningful "everyday feedback".
- Elicit feedback from the employee and be able to answer questions.
- Discuss performance and professional development goals. Give employee an additional assignment.

- Ask if required FERPA (if applicable) and compliance trainings have been completed.
- If the employee is a supervisor, recommend they sign up for the [Supervisory Development Series](#) – a training program for Supervisors across UM System.

Employees First 3 Months

- Continue having regularly occurring one-on-one meetings.
- Meet for an informal 3 month performance check-in.
- Ask if there is any training the employee needs.
- Provide information about continued learning opportunities including tuition assistance, training and development opportunities through Human Resources.
- Invite employee to UMKC events and introduce them to others.

Employees First Year

- Review progress on performance goals and professional development goals
- Celebrate successes and recognize employees contributions
- Continue providing regular informal feedback in one-on-one meetings.
- Discuss employees experience at UMKC to date – solicit feedback on experience and see if there are opportunities for change and improvement:
 - Include discussing employees knowledge, skills and abilities, and if they are being utilized. Discuss ways to better utilize them.
 - Begin discussing plans for 2nd year of employment.

Additional Information

If your employee has questions about benefits? Or how to enter your time? HR is here to help you and your new employee during this transition.

Contact the UMKC HR Service Center at
816-235-1621
or visit
www.UMKC.edu/HR