New Employee Checklist

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

Before Employee’s Start Date

- Before their first day of work consider sending your new employee a card or a welcome note to their home.
- 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 HR orientation ends
  - Dress code for department
- Email Department of the new hire. Include start date and employee’s role. 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 employee for them to set meetings up once they begin working.
- 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 and request necessary security access (PeopleSoft, ePro, etc.).
- 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 9:00 am to complete their new 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.
- 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.
- 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

Employee’s First Week

- Give employee their initial assignment (make it something small and doable).
- Debrief with employee after they attend initial meetings and trainings. Continue to touch base briefly each day.
- Explain the annual performance appraisal and goal setting process.
- Review the process related to the probationary period (including what paid time off is available).
- Arrange for a personal welcome from the unit leader.
- Ensure the employee has fully functioning computer and access to systems 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 Goals 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.

Employee’s First 30 Days

- Schedule and conduct regularly occurring one-on-one meetings.
- Continue to provide timely, ongoing and meaningful feedback.
- Elicit feedback from the employee and be able to answer questions.
- Discuss performance and professional development goals. Give employee additional assignments.
- Ensure employee completes the required trainings:
  - Building a Foundation: Discrimination Prevention & Title IX
  - Make IT Safe – IT Security Awareness Training
  - FERPA Training (if applicable)
- If the employee is a supervisor, recommend they sign up for the Supervisory Development Series – a great training program for Supervisors at UMKC.