



## New Employee Checklist:

**DEPARTMENT**

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**Employee Name:** \_\_\_\_\_ **Date of Hire:** \_\_\_\_\_

**Position:** \_\_\_\_\_ **Supervisor:** \_\_\_\_\_

### **PRIOR TO FIRST DAY:**

- Put together welcome packet from the department and include: job description, welcome letter, contact names, and phone lists (other suggestions would be information about the school, department, etc.) (position descriptions will be sent by HR and uploaded to the job requisition)
- Clean the work area and set up office space with basic supplies.
- Order office or work area keys (Poly South: Gloria Nelson; Main Campus: Ed Drock)
- Order business cards and name plate (Main Campus: contact Department Admin for office name plate)
- Ensure all IT equipment is requested (through Workday) and equipment is setup at the correct workstation and connected. (make sure to include the email groups and drives that the employee needs to access) (email will come from IT for you to complete)
- Inform your department about the new hire (include name, position title, and start date)
- Arrange for a campus tour (speak with Admissions or you can plan to take them yourself)
- Select a peer/mentor (pick someone who understands the university's culture & environment, has time to be accessible, is familiar with the employee's role, has strong communication, and is a solid performer)
- Prepare any training that the employee will need to take to perform the duties of the job.
- Communicate with the new employee regarding the first day of employment. (i.e., when and where the employee is expected to show up, and who they will meet when they arrive on campus)

### **FIRST DAY:**

- Be available to greet the employee on the first day.
- Ensure all paperwork has been completed with HR.
- Ensure that employee has obtained office keys.
- Ensure that employee has obtained ID Badge (will need to visit the wellness center).
- Take employee on a campus tour. Introduce employee to others in the workplace.
- Introduce employee to his/her peer/mentor.
- Take employee out to lunch (optional).

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- Explain how to get additional supplies.
- Provide information on setting up voicemail and computer, including email signature block with phone number.

### **Schedule, Job Duties, and Expectations**

- Provide an overview of the functional area – its purpose, organizational structure, and goals.
- Review job description, outline of duties, and expectations.
  - Ensure a signed copy is returned to HR along with the provided credentialing form. (Please return this document to HR within the first week of employment)
- Review hours of work. Explain policies and procedures, use of vacation and sick time, holidays, etc.

### **FIRST WEEK:**

- Check with the employee to ensure that there are no additional supplies that they feel are needed to perform his/her duties successfully.

### **Schedule, Job Duties, and Expectations**

- Give employee his/her initial assignment.
- Debrief with employee after he/she attends initial meetings, attends training, and begins work on initial assignment. Ensure that the employee understands what is expected of them. Touch base meetings are recommended.
- Provide additional contextual information about the department and organization to increase understanding of the purpose, goals, and initiatives.
- Explain the annual performance review and goal-setting process.
- Ensure a signed copy of the position description and credentialing form (provided by HR) is returned to the HR office within the first week of employment.

### **FIRST MONTH:**

### **Schedule, Job Duties, and Expectations**

- Schedule and conduct regularly occurring one-on-one meetings, ensuring to provide timely, on-going, meaningful feedback. Obtain feedback from employee and be available to answer questions. Make sure to advise where you feel they can show improvement.

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- Explain the performance evaluation process.
- Discuss performance and professional development goals.
- If you have not already done so, please make sure that a signed copy of the employees Position Description and a completed Credentialing Form has been submitted to HR.
- Meet with employee and peer/mentor to review first weeks and answer questions.

### **Training and Development**

- Work with the HR Training Administrator to ensure that employee is enrolled in any mandatory compliance training.

## **FIRST THREE MONTHS:**

### **Schedule, Job Duties, and Expectations**

- Continue having regularly occurring one-on-one/group meetings.
- Touch base with employee and peer/mentor.
- Meet and complete employee's ninety (90) day Probationary Evaluation.

### **Training and Development**

- Ask if there is additional training that the employee feels they need to perform their duties accurately.

## **FIRST YEAR:**

### **Schedule, Job Duties, and Expectations**

- Celebrate successes and recognition of employee's contributions.
- Continue providing regular informal feedback; provide formal feedback during the annual review process.
- Have a conversation with employee about his/her experience at Florida Poly.
  - o Revisit employee's understanding of their role/responsibilities as related to the job description previously reviewed.
  - o Review extent that employee's skills and knowledge are being utilized and ways to better utilize them (i.e., what's working, what they need more of, etc.)
  - o Begin discussing the year ahead.



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### **Training and Development**

- Discuss employee's professional development goals and identify relevant learning opportunities.