



Supervisor Checklist for New Employees

Wright State University

How to use this checklist:

New employees work very hard to make a good first impression the first day on the job, and you should too. When you make a new hire feel comfortable, welcome, and at ease, you set the stage for success. Making the first day a positive experience lays the groundwork for a long and rewarding professional relationship.

Recognizing that new employee orientation is a continuous process, this checklist is designed as a guide for you to use to accustom the new employee with the department and the University. The following checklist is a guide for you which includes a variety of activities to consider when bringing a new employee on board. Not all the items may apply to every department or every new employee.

The checklist is not meant to limit you in the orientation of your new employee, but rather to act as an outline of the minimum information that should be discussed during the initial stages of the employee's hire.

1. This checklist should be completed for all Classified, Faculty, and Unclassified employees beginning employment with the University.
2. The checklist should be completed within the first week to month following the employee's start date.
3. Copies of the completed checklist should be made and provided to the employee. The original should be retained in departmental files/records.

Please note, sections of this checklist may be completed for employees who have received a promotion or transfer to another department. It may also be used when accustoming new temporary employees or student workers.

The following information should be completed **PRIOR to the First Day.**

Employee Orientation: The new employee will be registered to attend New Employee Orientation, which will occur on the first day of employment.

- Verify with Department's Human Resources Representative (x2120) that employee is registered to attend orientation.

_____ is registered to attend orientation on _____*.
 (Employee Name) (Orientation Date)

*Sessions will be a full day (8:30 a.m. – 4:30 p.m.) and will provide University information to new employees.

Paperwork:

- Touch base with Human Resources to ensure appropriate hiring paperwork has been completed.
- Update the department's organization chart to include the new employee.
- Paperwork for system, network, and phone access should be completed prior to the start date or as quickly within the first week as possible.
 - Telephone number
 - Voicemail
 - All department or team shared drives or network locations
- An agenda for the first week (how employee will spend their time) should be created to show the new employee that you are prepared for their arrival and focused on ensuring a smooth & welcoming transition.

Clean and Prepare the Workspace: A new employee should enter an environment that looks prepared for their arrival.

- Office Supplies:** Provide initial supplies (pens, pencils, tape, stapler, note pads, post it notes, paperclips, etc.) to the employee.
- Clean and Prepare Workstation:** The workstation of the new employee should be clear of clutter, old paperwork, garbage, etc. The area, desk drawers and shelves should be empty and clean.
- Identification:** Order business cards, name tag, and/or name plate from Printing Services, or leave order process on desk for completion.
- Additional Resources:** Gather any resources (i.e. voicemail instructions, campus maps, point of contacts...) needed for the job.

Prepare other Team Members for Employee's Arrival: It is important to inform the new employee's co-workers of their arrival date.

- Send an e-mail or post an announcement for team members about the new employee's arrival. Include individuals in other departments who will be working with the new employee.
- Talk with current team members about the new employee's role and responsibilities.
- Make lunch plans for the first few days, if possible.
- Update internal telephone lists as needed.
- Remind team to update e-mail groups.
- Identify at least one individual who is willing to act as a mentor/guide for the new employee. Determine that person's role.

The following information should be completed **On the First Day.**

- Personally welcome the new employee when he or she arrives.
- If the employee has not completed some hiring paperwork, take them to Human Resources to complete.
- Describe the department orientation plan for the first few days.
- Have employee sign any forms required to obtain the tools for their job.
- Stress the importance of service to students.
- Ask a co-worker to take the new employee to break and lunch on the first day at work. Suggest places available for breaks and lunches. Explain use of campus eating facilities.
- Discuss the new employee's role and expectations.
- Allow time to set-up workspace, voicemail, e-mail, etc.
- Give a simple initial work assignment.
- Meet with the new employee at the end of the day to answer any questions and to find out how the first day went.

The following information should be completed within the **First Week.**

Work Responsibilities and Assignments:

- Position Description:** Review the employee's position description and give the employee a copy.
- Work Assignments:** Arrange for specific work assignments and assist in initial performance.
- Job Assistance:** Designate a person that the employee may call for questions, clarification, and future assistance. May be the same person assigned to be new employee's mentor.
- Quality:** Discuss departmental quality standards and expectations. Provide any written documentation, if applicable.
- Records:** Show employee where to locate any records or files necessary for the job. Explain confidentiality policy and how to handle confidential information and records.
- Standards of Conduct:** Review acceptable and unacceptable performance and behaviors and how it is handled.

- Issues and Concerns:** Discuss the department policy regarding issues and concerns related to work responsibilities and assignments. Provide to whom the employee should talk to and the process of expressing issues and concerns. Explain “open door policy.”

Work Environment:

- Co-workers and supervisors:** Introduce and explain their work relationships. This will help provide a clear understanding of roles and responsibilities.
- Contacts:** Distribute a staff list with telephone numbers, e-mail addresses, etc. Include a list of main contacts for employee’s position with a basic description of what the individual does.
- Department’s Organizational Chart:** Explain the department’s organization chart, which should be updated to include new employee. Explain organization, stating names, titles, and responsibilities.
- Campus:** Provide new employee with a campus map and a map of the tunnel system. Show and describe the location of the department’s building in relation to other buildings on campus. Inform employee of the location of other buildings that may be needed.
- Department Building:** Give a tour of the department building including other work stations, stairs, elevators, restrooms, emergency exits, break room, vending machines, etc.
- Dress:** Explain any dress requirements and/or acceptable dress for the department. For example: uniforms, business professional dress, business casual, casual Fridays, etc.
- Emergency Evacuation Procedure:** Explain emergency evacuation procedure, safety policy, and locate emergency exits and fire extinguishers. Inform employee of “outside meeting place” in case of fire or other emergency.
- Equipment:** Explain the use of office equipment (i.e. telephone system, how to access computer, software, and other equipment, etc.). Locate office supplies and inform employee on how to order, and/or whom to contact.

Work Procedures and Policies

- Emergency Contact:** Determine how to contact the employee during non-working hours.

- Parking and ID card:** Explain the use of parking facilities, the difference between student and staff parking spaces, and location of lots most convenient to the department. Explain Wright1Card, its purpose, and uses (i.e. parking gates, library card, dining card, etc.).
- Pay Stub and Timecard:** Explain when and how pay advices are distributed. Provide an explanation of WINGS Express and how to access pay stub and/or timesheet.
- Keys and Access Codes:** Provide any necessary equipment, access codes, etc. Be sure to provide any keys to office, desk, cabinets, etc.
- Computer Use:** Explain any restrictions and expectations related to use of the computer for personal use, internet access, computer games, etc.
- Telephone:** Explain how the telephone etiquette and departmental practices for telephone usage and personal calls. Explain how to set up voicemail and any requirements for voicemail message.
- Cell Phones:** Explain any restrictions, if appropriate, related to cell phone use during work hours, breaks, and/or lunch. Explain any restrictions related to use of text messaging. Inform employee of university option for text messaging during an emergency.
- Noise Level:** Explain any restrictions, if appropriate, related to talking with co-workers or the use of radios, iPods, or MP3 players.
- Smoking Policy:** Provide University smoking policy and information about designated smoking areas.

Work Schedule:

- Time off Situations:** Review when and who to call when absence is necessary due to personal emergencies or immediate need for time off. Explain procedure for requesting time off and how to fill out vacation/sick leave request forms and from whom to request leave.
- Inclement Weather:** Discuss inclement weather and whether the employee is identified as an emergency employee. Explain where employees can obtain information concerning closure of the University.
- Timesheet Completion & Submittal:** Explain departmental time reporting procedures, the completion of timesheets in WINGS Express, and deadlines for submitting timesheets. Provide employee with a copy of the Payroll schedule.
- Work Days:** Provide information on work schedule and hours. Explain any exceptions and reasons for them.
- Overtime/Comp Time:** Discuss process and authorization required for overtime and/or compensatory time.

- Meals and Breaks:** Review length of lunch and breaks and how the time schedule works. Review specific times for lunch and breaks, if designated. Review information on what is available for lunch and breaks (i.e. area restaurants, vending machines, campus dining, etc.).

Office Protocols:

- Access and Security:** Provide information related to accessing the office or department as well as any security codes necessary to gain access.
- Locking Offices, Desks, and Filing Cabinets:** Discuss the protocol for locking the office, doors, desk drawers, or filing cabinets.
- Conference Rooms or Designated Office Space:** Provide information related to the use of office space, break rooms, or conference rooms within the department, cover the reservation process, usage, etc.
- Coffee/Water Cooler:** Discuss the process related to coffee or water usage within the department.
- Birthday Celebrations:** Provide the process for celebrating birthdays within the department.
- Refrigerator/Microwave/Toaster Usage:** Provide the protocol for using and/or cleaning any department refrigerators, microwaves, or other appliances. Also include the process for supplies, if appropriate.
- Mailboxes:** Review the process to receive and send mail within the department and across the University. Show the employee the location of department mailboxes and where to locate the campus mail room.
- Sign-In/Sign-Out:** Review any sign-in or sign-out processes in the department.
- Filing:** Discuss the process for individual desk files and department wide files. Review how the filing should be handled, where it is located, etc.
- Record Retention:** Review and provide the Records Retention Policies.

I have reviewed the above information with the new employee. He or she was given all the necessary information for the job. All policies and procedures within the department and across the University were discussed. An explanation of all the checked items was given along with answers to any questions the new employee had.

Employee's Signature: _____ **Date:** _____
Supervisor's Signature: _____ **Date:** _____