Checklist for New Employees

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| **EMPLOYEE INFORMATION** |
| Name: Enter text. | Start Date: Enter a date. |
| Position: Enter text. | Manager: Enter text. |
| **MANAGER** |
| *Prior to new employee start date:*[ ] Assign peer ambassador employee(s) to answer general questions. (See peer ambassador program in Managers Toolkit.)[ ] Call to officially welcome the new hire to UMass after confirmation of acceptance.[ ] Initiate, with the PA or DA, the roll on form and send to roll on distribution group.[ ] Send an informal announcement (via e‐mail) to the department announcing the new employee.*Once Employee Arrives:*[ ] Introduce new employee to team.[ ] Manager takes employee to lunch or delegates to PA or DA. |
| **DEPARTMENT ASSISTANT (DA)** |
| *Prior to new employees arrival:*[ ] Arrange time with HR for onboarding and Facilities for the first day.[ ] Prepare the employee’s first day and first week agenda. (Agenda template in Managers Toolkit.)[ ] Invite employee to regularly scheduled meetings, and set up weekly/biweekly 1:1 meeting with their manager.[ ] Order supplies – paper, pens, keys, business cards (if applicable).[ ] Prepare the new employee's workspace with appropriate supplies and make sure that it is clean and ready.[ ] Prepare or update department-specific section of employee Welcome Packet. (Department Information Checklist in Managers Toolkit.)[ ] Make sure welcome packet is on employee's desk.[ ] Determine location for “First Day” welcome lunch with new employee. Work with manager to determine who should be invited.[ ] Initiate all forms for access requests to department specific systems (external and internal), working with manager when necessary. |
| **PEER AMBASSADOR (PA)** |
| *Prior to new employee arrival:*[ ] Coordinate with security/reception to meet employee first day.[ ] Sign welcome card and distribute around office to be signed.[ ] Assure employee work space is prepared with Welcome Packet and supplies.*Once new employee arrives:*[ ] Greet the new employee at the designated time and location.[ ] Review agenda with employee.[ ] Assist employee with:[ ] Log into computer[ ] Set-up email signature[ ] Set‐up voicemail[ ] Time- Reporting (if manager, please contact Sharon Vieira @ x5-7566 or Carol Dugard @ x5-7572) [ ] Explain how to use office equipment, obtain office supplies, make travel arrangements, and the like.[ ] Periodically check in with the new employee during the first 30-60 days. |