

Manager Checklist for New Employee Orientation

EMPLOYEE INFORMATION		
Name:	Start Date:	
Position:	Manager:	
PRIOR TO EMPLOYEE'S FIRST DAY		
<input type="checkbox"/> Call to officially welcome the new hire to Yale after confirmation of acceptance.		
<input type="checkbox"/> Send an informal announcement (via e-mail) to the department announcing the new employee.		
<input type="checkbox"/> Prepare the employee's first day and first week agenda.		
<input type="checkbox"/> Schedule uninterrupted time (sets tone) to meet with new employee and orient them to your department		
<input type="checkbox"/> Prepare the new employee's work space with appropriate supplies and make sure that it is clean and ready.		
<input type="checkbox"/> Set up new employee's computer, printer, phone		
<input type="checkbox"/> Have key items (set up) on computer (e.g. Yale website, Yale phonebook, Learning Center website, HR website)		
<input type="checkbox"/> Order supplies – paper, pens, keys, business cards (if applicable)		
<input type="checkbox"/> Assign peer "mentor" employee(s) to answer general questions. Review objectives.		
<input type="checkbox"/> Determine location for "First Day" welcome lunch with new employee, preferably with yourself or another employee, and/or schedule "get to know you" 15 minute meetings with the team members of the new employee.		
EMPLOYEE'S FIRST DAY		
INTRODUCTION TO DEPARTMENT		
<input type="checkbox"/> Introduction to the department including:	<ul style="list-style-type: none"> • Department mission and strategic plan • Relation to other departments • Organization of department – Organizational Chart, if available 	
UNIVERSITY AND DEPARTMENT POLICIES		
<input type="checkbox"/> Review key policies. (Focus is on department)	<ul style="list-style-type: none"> • Lateness policy • Reporting absence • Vacation and sick leave • Holidays • Time reporting (time cards, if applicable) • Overtime • Performance reviews 	<ul style="list-style-type: none"> • E-mail and Internet use • Security • Confidentiality • Safety • Emergency procedures • Injury prevention • Dress code
INTRODUCTION TO THE JOB		
<input type="checkbox"/> Review general information.	<ul style="list-style-type: none"> • Office/desk/work station • Work hours, breaks, mealtimes, etc. • Keys (if applicable) • Building access/security • ID badges and parking • Business cards (if applicable) • Handling confidential information • Conference rooms 	<ul style="list-style-type: none"> • Staff list • Important telephone numbers, including new employee's • Mail (incoming and outgoing) • Expense reports, if applicable • Purchase requests/P-Card, if applicable • Shipping (FedEx, DHL, and UPS)

INTRODUCTIONS AND TOURS			
<input type="checkbox"/> Introduce new employee to department staff and key individuals during tour.			
<input type="checkbox"/> Tour facility, including:	<ul style="list-style-type: none"> • Restrooms • Mail rooms • Copy machine • Fax machine 	<ul style="list-style-type: none"> • Bulletin board • Parking • Printers • Office supplies 	<ul style="list-style-type: none"> • Water cooler • Coffee area • Vending machines • Emergency exits
POSITION INFORMATION			
<input type="checkbox"/> Review job description, responsibilities, and performance expectations/goals.			
<input type="checkbox"/> Review competencies necessary for success at Yale and in department.			
<input type="checkbox"/> Review initial job assignments and development plans. Include training opportunities.			
<input type="checkbox"/> Facilitate enrollment in required training courses via TMS (Training Management System) and the Learning Center.			
COMPUTERS AND TELEPHONE			
<input type="checkbox"/> Hardware and software reviews, including:	<input type="checkbox"/> E-mail or Outlook	<input type="checkbox"/> Shared server (if applicable)	<input type="checkbox"/> How to set up voicemail
	<input type="checkbox"/> Calendar software		<input type="checkbox"/> How to use telephone system
EMPLOYEE'S FIRST WEEK			
<input type="checkbox"/> Have new employee meet for 30 minutes, one-on-one, with members of department (or key individuals) to discuss:	<ul style="list-style-type: none"> • Job duties • How job roles interact • How they might work together in the future 		
<input type="checkbox"/> Schedule weekly/bi-weekly meetings with new employee			
<input type="checkbox"/> Schedule 30-day meeting with new employee			
<input type="checkbox"/> Schedule 90-day meeting with new employee			
EMPLOYEE'S FIRST MONTH			
<input type="checkbox"/> Meet with new employee at the end of first 30 days to:	<ul style="list-style-type: none"> • Review observations, issues and priorities • Continue to clarify roles, responsibilities, and expectations, as needed • Ensure any mandatory training has been completed • Establish a plan for professional development and encourage training opportunities through Yale Learning Center. • Answers questions and concerns. 		
<input type="checkbox"/> Meet with peer mentor to review any concerns or needs (without violating the parameters of the peer relationship.)			

Resources for Managers

Employee Service Center	(Central & Med)	432-5552		
Yale ID Center	(Central)	432-0165	(Med)	785-4286
Parking	(Central)	432-9790	(Med)	785-6456
ITS/Telecom Help Desk	(Central)	432-9000	(Med)	785-3200
University Payroll	(Central & Med)	432-5408	FAX	432-6662