SAN JOSÉ STATE UNIVERSITY

MANAGER'S CHECKLIST FOR
NEW EMPLOYEE INTEGRATION

Directions: Complete during the new employee's first 90 days on the job. An addendum can be attached to add department-specific items, if necessary. Completion of this Checklist is the *shared* responsibility of the hiring manager/supervisor and the new employee. Send the completed Checklist to: OD & T – 0046.

I. NEW EMPLOYEE INFORMATION

Name:	**Start Date:**
Position Title:	☐ **Exempt** ☐ **Non-Exempt**
Employee ID #:	**Grade:**
Manager/Supervisor Name:	**Ext. #:**

II. PRIOR TO FIRST DAY

Manager/Supervisor Responsibilities:

Work Area

☐ Ensure workstation is clean and organized
☐ Work with HR and EARC on any existing registered/documented work place accommodation approval.
☐ Establish computer, network, and telephone access
☐ Equip with office supplies: pens, pencils, writing pads, stapler, paper clips

Other (as appropriate)

☐ Gather vital reference materials (i.e. phone directory, contact list, voice mail and email instructions)
☐ Order Nameplate
☐ Order Business Cards
☐ Need procurement form
☐ Order Credit Card

Communication

☐ Call the new employee to welcome him or her.
☐ Notify key contacts of new employee
☐ Encourage team to welcome new employee

Performance Support

☐ Create a training schedule for first week (or longer, if appropriate)
☐ Gather job-specific resource information (e.g. position description, reference materials, manuals; etc.)

III. DURING FIRST DAY ON THE JOB

Manager/Supervisor Responsibilities:
☐ Introduce employee to staff and team members/co-workers
☐ Accompany the new employee to lunch (or arrange for a team member, if you are unavailable)
☐ Meet with employee to discuss job description and responsibilities, and initial performance expectations
☐ Conduct new employee job orientation discussion: job role, goals, connection to organization
☐ Provide orientation to department
☐ Discuss pre-approved vacation and any other time-off (All existing approved absence requests from 5/25/10-12/31/10 entered and approved in Absence Management will be honored).
☐ Provide information regarding casual Fridays, and other traditions
☐ Review & explain employee resources on-line, particularly those which are department-specific
☐ Coordinate basic telephone/computer/email account instruction
☐ Review payroll processing, including time and attendance, and time away from work tracking
☐ Review basic guidelines (i.e.: time-off requests, dress, breaks, work hours, lunch time, phone coverage)
☐ Review sick/emergency contact phone number and process
☐ Review training schedule for first week (or longer, if appropriate)
☐ Schedule time for conversation of individual development for new employee
Security Access
☐ Acquire building & floor access cards (Security Access Card form)
☐ Order office keys, as required
☐ Process requests for access/passwords for proper CMS access for department-specific systems.

IV. DURING FIRST AND SECOND WEEKS ON THE JOB

Manager/Supervisor Responsibilities:
☐ Provide an overview of department functions and team member responsibilities
☐ Ensure all required training remaining is scheduled
☐ Review time sheet/ overtime rules
☐ Review other departments' overall functions and highlight which are internal customers
☐ Review security and safety measures
☐ Review personal use of telephone and computer
☐ Conduct workstation evaluation and schedule ergonomics training
☐ Introduce new employee to other cross department members
☐ Invite new employee to group lunch with the entire team at end of second week on the job
☐ Meet with employee to establish initial job expectations/goals employee should meet by end of first 90 days on the job:
☐ Identify immediate systems and job-specific training needs

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V. Before End of First 30 Days On The Job

Manager/Supervisor Responsibilities:

- ☐ Verify Anniversary month with HR for performance evaluation
- ☐ Meet with employee to check-in:
  - Discuss initial experiences
  - Review progress towards initial goals
  - Answer any questions

VI. During First 60 Days On The Job

Manager/Supervisor and Employee Responsibilities:

- ☐ Meet to check-in:
  - Discuss initial experiences
  - Review progress towards initial goals, and adjust as necessary
  - Answer any questions

VII. Before End of First 90 Days On The Job

Manager/Supervisor and Employee Responsibilities:

- ☐ Create training and development plan

This confirms that this employee has successfully completed the orientation process. I will continue to communicate expectations throughout the year.

Manager/Supervisor's Signature Date

This confirms that I have completed the orientation process. I will continue to update my manager/ supervisor on my performance as appropriate.

Employee's Signature Date

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