**Manager Checklist for New Employees**

### EMPLOYEE INFORMATION

<table>
<thead>
<tr>
<th>Name:</th>
<th>Start Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Position:</th>
<th>Manager:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### PRIOR TO EMPLOYEE’S FIRST DAY

- Call to officially welcome the new hire to Yale after confirmation of acceptance.
- Send an informal announcement (via e-mail) to the department announcing the new employee.
- Prepare the employee’s first day and first week agenda.
- Schedule uninterrupted time (sets tone) to meet with new employee and orient them to your department.
- Prepare the new employee’s work space with appropriate supplies and make sure that it is clean and ready.
- Set up new employee’s computer, printer, phone
- Have key items (set up) on computer (e.g. Yale website, Yale phonebook, Learning Center website, HR website)
- Order supplies – paper, pens, keys, business cards (if applicable)
- Assign peer "mentor" employee(s) to answer general questions. Review objectives.
- Determine location for “First Day” welcome lunch with new employee, preferably with yourself or another employee.

### EMPLOYEE’S FIRST DAY

- Welcome new employee.
- Greet the new employee at the designated time and location – Discuss Day 1 agenda.
- Introduce new employee to peer mentor.
- Take new employee to lunch, and/or arrange for peer “mentor” to do so.

### INTRODUCTION TO DEPARTMENT

- Introduction to the department including:
  - Department mission and strategic plan
  - Relation to other departments
  - Organization of department – Organizational Chart, if available

### UNIVERSITY AND DEPARTMENT POLITICS

- Review key policies.  
  (Focus is on department)
  - Lateness policy
  - Reporting absence
  - Vacation and sick leave
  - Holidays
  - Time reporting (time cards, if applicable)
  - Overtime
  - Performance reviews
  - E-mail and Internet use
  - Security
  - Confidentiality
  - Safety
  - Emergency procedures
  - Injury prevention
  - Dress code

### INTRODUCTION TO THE JOB

- Review general information.
  - 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
  - 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

- Introduce new employee to department staff and key individuals during tour.

Tour facility, including:
- Restrooms
- Mail rooms
- Copy machine
- Fax machine
- Bulletin board
- Parking
- Printers
- Office supplies
- Water cooler
- Coffee area
- Vending machines
- Emergency exits

### POSITION INFORMATION

- Review job description, responsibilities, and performance expectations/goals.
- Review competencies necessary for success at Yale and in department.
- Review initial job assignments and development plans. Include training opportunities.
- Facilitate enrollment in required training courses.

### COMPUTERS AND TELEPHONE

- Hardware and software reviews, including:
  - E-mail or Outlook
  - Calendar software
  - Shared server (if applicable)
  - How to set up voicemail
  - How to use telephone system

### EMPLOYEE’S FIRST WEEK

- Have new employee meet for 30 minutes, one-on-one, with members of department (or key individuals) to discuss:
  - Job duties
  - How job roles interact
  - How they might work together in the future

- Schedule weekly/bi-weekly meetings with new employee
- Schedule 30-day meeting with new employee
- Schedule 90-day meeting with new employee

### EMPLOYEE’S FIRST MONTH

- Meet with new employee at the end of first 30 days to:
  - 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.

- Meet with peer mentor to review any concerns or needs (without violating the parameters of the peer relationship.)

---

**Resources for Managers**

<table>
<thead>
<tr>
<th>Service</th>
<th>Phone (Central)</th>
<th>Phone (Med)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yale ID Center</td>
<td>432-0165</td>
<td>785-4286</td>
</tr>
<tr>
<td>Parking</td>
<td>432-9790</td>
<td>785-6456</td>
</tr>
<tr>
<td>ITS/Telecom Help Desk</td>
<td>432-9000</td>
<td>785-3200</td>
</tr>
<tr>
<td>University Payroll</td>
<td>432-5408</td>
<td>FAX 432-6662</td>
</tr>
</tbody>
</table>