

<b>Florida Atlantic University</b> <b>Checklist For Supervisors of New SP &amp; AMP Employees</b>
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The following checklist includes important topics for supervisors to keep in mind while orienting new employees. This checklist is meant to serve as a guide, but each supervisor is encouraged to expand upon it to fit their specific needs.

Employee's Name \_\_\_\_\_ Date of Appointment \_\_\_\_\_

Supervisor's Name \_\_\_\_\_ Department \_\_\_\_\_

**Pre-Arrival:**

- \_\_\_ 1) Complete a Personnel Action Form and schedule the new employee for New Employee Orientation with Human Resources
- \_\_\_ 2) Call the new employee to welcome him/her a few days before the scheduled start date. Inform him/her of new hire orientation held every Monday in Conference Room 118 located in the Human Resources Department.
- \_\_\_ 3) Items the employee will need to know/have for first day.
  - \_\_\_ Parking Information    \_\_\_ I.D./Voided Check    \_\_\_ Supervisor's Contact Information
  - \_\_\_ Social Security Card    \_\_\_ Original Education Documents
- \_\_\_ 4) Notify your entire department of the new hire's arrival.
- \_\_\_ 5) Prepare new employee's workspace.
  - \_\_\_ Desk/Office    \_\_\_ Keys    \_\_\_ Supplies
  - \_\_\_ Voicemail    \_\_\_ Email    \_\_\_ Computer Access

**First Week:**

- \_\_\_ 1) Greet your new employee with a warm welcome.
- \_\_\_ 2) Introduce the new hire to the entire department.
  - \_\_\_ Give Employee a Department Roster    \_\_\_ Explain Other Positions in the Department
- \_\_\_ 3) Give the new employee a tour of his/her work area.
  - \_\_\_ Equipment/Supplies    \_\_\_ Restrooms    \_\_\_ Bulletin Boards
  - \_\_\_ Employee Lounges    \_\_\_ Emergency Exits    \_\_\_ Safety Items
  - \_\_\_ Telephone Directory
- \_\_\_ 4) Review policies and procedures regarding:
  - \_\_\_ Work Hours    \_\_\_ Meals/Breaks    \_\_\_ Medical Appointments
  - \_\_\_ Attendance    \_\_\_ Annual Leave    \_\_\_ Sick Leave
  - \_\_\_ Holidays    \_\_\_ Timesheets    \_\_\_ Budget Procedures
  - \_\_\_ Attire    \_\_\_ Employee Handbook Online
- \_\_\_ 5) Review Job
  - \_\_\_ Position Description    \_\_\_ Individual Goals/Expectations    \_\_\_ Training Requirements
  - \_\_\_ Organizational Chart    \_\_\_ Departmental Goals
- \_\_\_ 6) Review FAU [performance management](#) philosophy/appraisal process
  - \_\_\_ Process    \_\_\_ Documents    \_\_\_ Performance objectives/standards

\_\_\_ Probationary Reviews    \_\_\_ Annual Review

### **First 1-12 Months:**

- \_\_\_1) Schedule frequent meetings with the employee.
- \_\_\_2) Encourage an open line of communication between yourself and the employee.
- \_\_\_3) Assess progress the employee has made.
- \_\_\_4) Continue to define the employee's role within the department
- \_\_\_5) Continue the performance management process.

### **SP Employees**

#### **First 3-6 Months:**

- \_\_\_1) Begin preparing for the probationary appraisal. A good way for supervisors to prepare for the appraisal is to document examples of both excellent and/or poor performance throughout the appraisal period. Make notes of your observations and any significant information that impacts the employee's performance. It is often difficult to remember clearly what happened many months before, and the appraisal should be a reflection of the entire appraisal period, and not just the last two or three months.
- \_\_\_2) For SP employees, discuss the 6 month probationary appraisal. Set a meeting to offer the employee feedback including areas in which the employee is performing well and also areas in which there is room for improvement. Encourage feedback from employee on employment experience.

### **AMP Employees**

#### **First 6-12Months:**

- \_\_\_1) Begin preparing for the annual performance appraisal. A good way for supervisors to prepare for the appraisal is to document examples of both excellent and/or poor performance throughout the appraisal period. Make notes of your observations and any significant information that impacts the employee's performance. It is often difficult to remember clearly what happened many months before, and the appraisal should be a reflection of the entire appraisal period, and not just the last two or three months.
- \_\_\_2) For AMP employees discuss the Annual Performance Appraisal. Use the annual appraisal process as a means to document the employee's performance over the past twelve months. All of the elements of Performance Management lead up to the performance appraisal. The appraisal is a culmination of all of the discussions and meeting that you have had with the employee; the on-going feedback; the development and assessment of goals; and the positive encouragement to be successful. Performance appraisals should never be a surprise!