

Florida Atlantic University

Checklist For Supervisors of New SP & AMP Employees

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!