Manager Checklist for New Employees

Congratulations on hiring this new employee. The following checklist is designed to help you prepare for the employee’s introduction to UMass Lowell from the very first work day through the entire first year of employment. Please encourage new employees to acquire new skills, meet changing customer expectations, find ways to contribute to UMass Lowell’s mission and vision, and continue to enjoy a rewarding career experience.

**Before the Employee’s First Day**

- Call employee, confirm start date, new employee orientation date, location, time and parking.
- If employee starts before attending orientation with Human Resources and Equal Opportunity & Outreach (HR/EOO), communicate to the new employee to visit HR/EOO on first day to complete their I-9 documentation.
- Schedule meetings with key people and once activated, add to the new employee’s calendar.
- Notify your department of the new hire.
- Pre-enroll the employee for any required job-related trainings (BuyWays, Summit etc...)
- Request access to the systems the new employee will need in their job:
  - **Financial System Access & Login**
    - BuyWays Requisitioner or Approver (all employees are automatically set up as shoppers) Complete “Purchasing Access Request”
    - PeopleSoft and SUMMIT Complete “Budget & SUMMIT Access Request”
    - Grants Complete “Grant Access Request”
- Ensure work area is set up appropriately with necessary supplies.
- Verify working computer or order new computer if needed.
- Schedule appointment with IT to meet with the new employee on their first day.
- Assemble welcome packet including:
  - Welcome letter
  - Schedule for first week
  - Department/Division organization chart
  - Department list including titles, phone extensions and emails
  - Campus Map
- Arrange for phone installation, if appropriate.
Employee’s First Day

☐ Begin and end the day with a face-to-face meeting.
☐ Provide welcome packet and review.
☐ Review job description and discuss job expectations.
☐ Introduce them to the department and staff.
☐ Give office tour which includes break/lunch areas, restrooms, copy room, office supply area, elevator, stairs, etc. (Include building tour)
☐ Introduce them to their work area; supply them with key(s) or other items to gain access to their office.
☐ If applicable take them to obtain their U-Card (ID) and parking decal.
☐ Ensure employee and IT representative meet to set up technology accesses.
☐ Overview and confirmation of accessibility to software and other technology used (calendar system, phone/voicemail, computer, email, reset email password, internet, departmental shared drives, printers, etc.).
☐ Review procedures to secure the office.
☐ Review UMass Lowell and department information such as:
  • University calendar
  • Emergency procedures
  • University closings
  • Security protocols and building hours
☐ Discuss transportation (shuttle service) and parking areas cross campus.

Employee’s First Week

☐ Review HR Direct protocols such as: time reporting procedures, direct deposit, etc.
☐ Provide employee list of pre-scheduled training dates and meetings.
☐ Technology check-in: verify working computer, departmental access/portal, printer hook-up, software needs, email, calendar, phone/voicemail, etc.
☐ Work with new employee to register for job-related trainings.
☐ Order business cards, name tag and name plate (if appropriate).
☐ Provide access to University and department guidelines.

Employee’s First Month

☐ Schedule weekly or bi-weekly meetings to help foster the engagement of the new employee with the organization.
☐ Discuss process for Performance Management and review performance standards.

During Employee’s First Year

☐ Continue to meet with new employee regularly throughout the year to establish goals and provide feedback.
☐ Register for Performance Management Workshop (if not yet attended).