



New Employee Manager Checklist

HIRING MANAGER - PREPARATION:

- **Operations:**

- Send out new hire announcement to department colleagues following department protocol
- Set up workspace or office space, if applicable
- Reach out to the new employee welcoming them to the University and setting expectations for their first day and first week. Provide information relating to schedule, dress code, and office location.
- Make arrangements for technology, see the technology section below
 - For IT Resources, please navigate to: technology.pitt.edu/it-resources-pitt-staff
- Order business cards and name badge in advance, if applicable
 - To initiate order, click here: ppt.pitt.edu/miscellaneous-purchases/university-branded-printing-business-cards-letterhead-more

- **Technology:**

- Make sure all devices and equipment are requested days in advance to the employee's first day and that equipment is in working order
- Create a list of the appropriate system drives the new employee should have access to on their computer for their respective department and communicate to systems staff/support to set up.
- Prepare telecommunications as applicable per department (Office phone, TEAMS phone, laptop)
 - Telecommunications services:
technology.pitt.edu/services/telecommunications
- Department Administrator to work with Pitt Digital on making sure the new hire is included on any departmental telephone or email distribution lists
 - To inquire: technology.pitt.edu/help-desk/247-it-help-desk



- **Pre-Orientation:**

- Work with department administrators on developing an internal departmental orientation plan and department administrator develop training schedule
- If applicable, consider signing up for supervisory trainings:
 - hr.pitt.edu/current-employees/learning-development/fsdp
 - [Office of Human Resources - Supervisor Essentials @ Pitt \(sharepoint.com\)](#)

- **Socialization & Community:**

- Consider creating a “buddy system” or mentorship component to onboarding, if not established
- Assign employee to have a departmental mentor to assist with onboarding and socialization
- Arrange for the new employee to meet with members of the department in their first day and throughout their first week/s

HIRING MANAGER – Onboarding and Orientation

Paperwork:

Complete all new hire forms for the human resources department:

- If it was not completed pre-hire, employees must complete all tax related paperwork. **If an employee has not completed their I-9, within 3 days of their start date, HR will be forced to remove them from their position without pay until this has been successfully completed.**
- Emergency contact form, check with department administrator
- To increase awareness around the resources around Public Safety amongst the university community, please share the following link: [Emergency Contacts | For Safety's Sake | University of Pittsburgh](#)
- Confidentiality Agreement, if applicable
- IP Agreement (send to Innovation Institute)
- Make sure employee sets up direct deposit
 - Self Service Instructions: payroll.pitt.edu/employee-self-service/
- Beneficiary Form for Life Insurance (send completed form to The Hartford)
 - hr.pitt.edu/sites/default/files/UnivPittsburghBeneficiaryForm.pdf



First Day:

- **Orientation: What does an employee need to know in order to successfully do their job?**
 - Provide University organization chart/information
 - Complete emergency contact information
 - Distribute name badge (if applicable)
 - Review Job Description with Employee and how performance is measured
 - Complete flexible working agreement, if applicable
 - policy.pitt.edu/er-20-flexible-work-staff-student-workers-and-temporary-employees
 - Discuss procedures for requesting time off, calling off sick, alert if going to be late
 - hr.pitt.edu/staff-handbook/paid-and-unpaid-time-off#timekeeping
 - Discuss parking options in and around the department - direct to the University's Parking website to sign up for Parking Wait List if applicable
 - pts.pitt.edu/mobility/parking
 - Review general office procedures and protocols (work hours, department expectations, lunch break times and duration, etc.)
 - If building is secured, ensure the appropriate cards/keys are programmed to give employee building access
 - Schedule a review for the end of the employee's first week, 3-month mark and end of 6-month provisional period
 - hr.pitt.edu/staff-handbook/employment-status-for-staff-positions#:~:text=Provisional%20Period%20of%20Employment,-When%20full%2Dtime&text=For%20both%20full%2Dtime%20regular,period%20is%20six%20calendar%20months
 - Supervisor/Department Administrator reserving time for new hire to complete required and recommended training (must be completed within Provisional Period):
 - Discrimination and Harassment Prevention (*required of all employees*)
 - Preventing Discrimination and Sexual Violence: Title IX, VAWA, and the Clery Act for Faculty & Staff
 - Information Security Awareness Training (*for full-time staff only*)
 - To access trainings: hr.pitt.edu/clearances-training/training-programs
 - Depending upon position, the following may be required as well
 - Child Abuse Recognition and Reporting online course (*for positions that work around minors*)
 - HIPAA training: [Module List \(pitt.edu\)](http://Module List (pitt.edu))
 - Environmental Health & Safety trainings: ehs.pitt.edu/training
 - Recommend completing the Public Safety Training: **Public Safety Training Module**
 - Supervisor/Department Administrator responsible for tracking progress and documentation of completion of required trainings



- **Socialization & Community: Onboarding quality is directly related to retention!**
 - Introduce employee to colleagues and provide tour of office space, facilities, building-consider a workplace tour
 - Introduce new hire to their assigned departmental mentor or buddy, if applicable.
 - Consider adding regular virtual or onsite group meetings to help reinforce departmental culture and community
 - Get involved in the campus community!
 - Office of Institutional Engagement and Well-Being
 - wellbeing.pitt.edu
 - Office of Engagement and Community Affairs and Volunteer Opportunities
 - [Volunteerism and Public Service | Office of | University of Pittsburgh](https://volunteer.pitt.edu)
 - United Way Campaign
 - unitedway.pitt.edu/events-volunteer-department-engagement-opportunities
 - Pitt Sustainability
 - Pitt Green Guide: <https://www.sustainable.pitt.edu/faculty-staff-green-guide>
 - Publications:
 - University Times
 - utimes.pitt.edu
 - Pitt Med Magazine
 - pittmed.pitt.edu
 - Pitt Magazine:
 - pittmag.pitt.edu
 - Pitt News
 - pittnews.com/

Week one:

- Have current staff check in on new employee to ensure they feel supported
- If employee is virtual or hybrid, schedule regular periods of time to check in and answer questions
- Discuss preferences related to timecards and time-off requests
- Schedule weekly or biweekly one-on-one meetings to discuss feedback, successes and obstacles
- For non-exempt employees: ensure that weekly timecard is successfully completed

Month one:

- Meet with employee to discuss performance over the last month
- Ensure that employee's paid time off is accurately accruing
- Proactively check in with employee about their onboarding experience and gather feedback



MID-PROVISIONAL REVIEW:

- Complete at the employee's three-month mark of employment
- Discuss metrics from the last 90 days
- Receive feedback from employee on how onboarding is going or what improvements could be made
- Ensure the completed review is filed as per the department's guidelines

END OF PROVISIONAL REVIEW:

- Complete at the end of employee's six months of employment
- Go over metrics from the first six months
- Go over goals and expectations going forward
- Ensure the completed review form is filed as per the department's guidelines

Annual Review:

- Reflect on the previous year: areas of strength, areas of improvement; movement toward goals.
- Congratulate the employee for reaching their one-year anniversary

Off-boarding:

- Communicate employee's departure with the team
- Collect company assets (badge, equipment, etc.)
- Update IT permissions/access
- Add 'out of office' message to email account before closing it down
- Conduct exit interview
- Develop plan for replacement and coverage