



Hiring Manager Checklist

Employee Name	PeopleSoft ID#	Manager Name	Agency/Department	Hire Date	Mentor Name

As the new employee’s manager, you play a vital role in the success of your new team member. Onboarding is a process, not an event. Please partner with your HR Representative and plan ahead for positive results. Long term retention of any new employee starts at recruitment. Use this checklist to ensure that you have all of the needed elements to help get your employee off to the best start possible.

- **When your employee has attended a New Employee Orientation session, they will be surveyed at 30, 60 and 90 days to assess the overall Onboarding experience.**
- **Please review the Discussion Form Sample Questions prior to formal meetings with the new employee.**
- **Decide if you will assign a mentor to your new employee; you can find training materials on the SPD training website (<http://www.in.gov/spd/2366.htm>).**

PRE-ARRIVAL

The messages we send to new employees before they join the organization are critical. We need to ensure we communicate often and well before the start date to ensure a smooth and effective transition in joining our team.

PRE-ARRIVAL	Activity	Date Complete
	<input type="checkbox"/> Send offer letter/eletter with instructions to visit the Onboarding website www.in.gov/spd/onboarding (include agenda) or follow current hiring practice	
	<input type="checkbox"/> Manager welcome phone call (1 week before start date) to discuss day 1 activities, parking, lunch, etc.	
	<input type="checkbox"/> Send email to team, letting them know to welcome the new hire on day one (email template available in Hiring Manager toolkit)	
	<input type="checkbox"/> Assign mentor to new hire	
	<input type="checkbox"/> Update or create Job Description and Work Profile (if applicable)	
	<input type="checkbox"/> Prepare workspace for arrival <ul style="list-style-type: none"> • Office supplies • Internet access • Phone access 	
	<input type="checkbox"/> Identify and request any specific equipment needed (i.e. cell phone, printer, laptop, etc.)	
	<input type="checkbox"/> Plan any welcome events and/or team lunches that will occur in the first day(s)	
	<input type="checkbox"/> Meet with mentor to discuss responsibilities during Onboarding experience	
<input type="checkbox"/> Take employee to the New Employee Orientation (NEO) session or ensure they know how to get to the orientation location (if applicable)		

FIRST IMPRESSIONS (WEEK ONE)

On the new employee's first days in the assigned work area, help acquaint the employee to his or her new environment by having the manager or the mentor provide a tour of the facility . You can find an orientation agenda on the Onboarding website, use this week one template as a supplement to that. Remember to pace your new employee; do not overwhelm them in the first week. Make the first day a compelling and valuable experience and maintain that energy throughout the first week!

Objective: Provide a welcoming and comfortable first week experience for the new employee that is planned and executed in an efficient manner.

FIRST IMPRESSIONS (FIRST WEEK)	Activity	Date Complete
	<input type="checkbox"/> Introduce the new employee to his/her mentor and explain the purpose, roles and responsibilities of the mentor <i>(if applicable)</i>	
	<input type="checkbox"/> Introduce the new employee to other key personnel, including the executive director and/or leadership team	
	<input type="checkbox"/> Coordinate a tour of the office facility, including location of restrooms, cafeteria/lunch room, mail room, copy room, etc. <i>(if mentor was not assigned)</i>	
	<input type="checkbox"/> Explain job roles and responsibilities to the new employee	
	<input type="checkbox"/> Have work assignments ready to ensure the employee feels productive immediately	
	<input type="checkbox"/> Provide a list of office contacts who can help address the new employee's questions <i>(use the mentor as a resource)</i>	
	<input type="checkbox"/> Overview any applicable policies/procedures <ul style="list-style-type: none"> • Attendance • Leaves requests • Workplace safety and security • State resources use & access • Building use & access security • Inclement weather 	
	<input type="checkbox"/> Overview the agency mission, vision, values, and goals	
	<input type="checkbox"/> Go to lunch <i>(or set up a team lunch)</i> at least one day this week	
	<input type="checkbox"/> Verify the employee has completed New Hire Benefits enrollment. If the employee has additional questions, refer them to the toll free SPD Benefits hotline at 855-773-4647. Benefit elections are due the Monday following the pay period the employee was hired in. <i>*Not applicable for part time or intermittent employees*</i>	
	<input type="checkbox"/> Set up 30 minute meetings <i>(to occur next week)</i> with each member on your team in order to discuss roles, responsibilities, interactions, etc., so that the new employee better understands the team and the people on the team. Who are the people they will meet with? <ul style="list-style-type: none"> • • 	
	<input type="checkbox"/> Meet with the new employee at the end of the week to see how the first week went	
	<input type="checkbox"/> Complete Manager Discussion Form for week 1 (http://www.in.gov/spd/2366.htm)	

GETTING ACQUAINTED (FIRST 30 DAYS)

During this "getting acquainted" phase, you will be primarily focused on socialization with your team, culturalization into the agency, assigning some meaningful work, and providing training opportunities. In this period, some areas of focus include: setting goals and expectations, defining roles and responsibilities, developing your relationship with the new employee, and work group orientation. Remember, spread out the activities for your new employee and give them some time to get settled in. Overwhelming a new employee early on can cause challenges later.

Objective: Reduce new employee anxiety, strengthen the bond between the new employee and the organization, begin culturalization and socialization, and provide some meaningful work and training opportunities.

GETTING ACQUAINTED (FIRST 30 DAYS)	Activity	Date Complete
	<input type="checkbox"/> Review department specific information <ul style="list-style-type: none"> • Mission, vision, values, goals and objectives • Organization of the department/organizational structure (org charts) • How the department interacts with others in the agency • Behavioral and cultural expectations in the department • Key staff /teamwork expectations • Departmental meetings (how often, topics, etc.) • Schedules • Written material/resources unique to your department • Review important intranet/SharePoint links/shared folders 	
	<input type="checkbox"/> Explain the new employee's relationship with other departments	
	<input type="checkbox"/> Review performance objectives for the new employee and set goals, use the job description as a reference	
	<input type="checkbox"/> Ensure the new employee understands the relationship between their job, the department, and the agency	
	<input type="checkbox"/> Set up at least one meeting for the new employee to meet and speak with <u>your</u> manager <i>Who is the person(s) they will meet with?</i> <ul style="list-style-type: none"> • 	
	<input type="checkbox"/> Set up one hour sessions for job shadowing and observation with each person on your team <i>Who are the people they will spend time with?</i> <ul style="list-style-type: none"> • 	
	<input type="checkbox"/> Meet with mentor regularly (<i>if applicable</i>) for progress updates and to get feedback on the new employee During the "getting acquainted" phase, the mentor is conducting the following with the new employee: <ul style="list-style-type: none"> • Meeting with the employee for one hour per week • Introducing the new employee to at least one person outside of the department per week • Occasionally going to lunch with the new employee 	
	<input type="checkbox"/> Discuss agency training opportunities, and give instructions on how the new employee should enroll in the courses offered	
	<input type="checkbox"/> Ensure employee is performing meaningful work/tasks, is completing the onboarding and training plans in a timely manner, and is getting the needed support from the mentor and others	
	<input type="checkbox"/> Verify that all "new hire orientation" required courses have been completed. You can review progress/completion of all e-Learning through PeopleSoft ELM (<i>manager self service</i>) <ul style="list-style-type: none"> • Information Resources User Agreement Training • Ethics Training • Sexual Harassment Prevention Training 	
	<input type="checkbox"/> Give performance feedback early and often to the new employee, find at least 3 things during this phase to recognize the new employee for	
	<input type="checkbox"/> Complete Manager Discussion Form for each formal session you conduct with the new employee (http://www.in.gov/spd/2366.htm)	
	<input type="checkbox"/> Near the end of this phase, give a brief evaluation of how you feel the employee is performing, identify areas of strength and opportunity, review the performance management process, and explain how performance is measured	
	<input type="checkbox"/> Meet with the new employee at least a ½ hour per week to follow up and ensure they continue to assimilate and are expanding their knowledge and capabilities. You want to	

find out how they are doing, what they have learned and challenges the employee faced.
Use these meetings to get to know the new employee better personally.

SETTLING IN (SECOND & THIRD MONTHS – DAYS 60-90)

During the “First 90 Days”, new employees should begin to acquire a full workload while managers monitor performance and regularly provide constructive feedback. Like the first day, this period is critical to forming new employee perceptions about the organization and job. In this period, some areas of focus include: fitting in with colleagues, developing the relationship with the manager, productivity/results, decision making, training opportunities and agency practices. A lack of focus on this phase can have negative consequences if employees do not feel integrated by the end of their first 90 days. Your role as manager is essential to the success of the onboarding program.

Objective: Identify any early transition issues, maximize and measure degree of engagement, continue to develop and provide increased job responsibilities.

SETTLING IN (SECOND AND THIRD MONTHS-DAYS 60-90)	Activity	Date Complete
	<input type="checkbox"/> Meet with the employee a minimum of 1-2 hours every other week to identify how the new employee is doing, what they have learned, challenges faced, and get to know the employee better personally. <ul style="list-style-type: none"> • Ask them how their meetings with people in other departments are going. What are they learning? How can they apply it? • Ask how things are going with their mentor. 	
	<input type="checkbox"/> Ensure the employee understands how cascading goals are connected, how the employee’s work impacts agency goals, and reinforce our culture and values	
	<input type="checkbox"/> Meet with mentor regularly for progress updates and to get feedback on the new employee During the “settling in” phase, the mentor is conducting the following with the new employee: <ul style="list-style-type: none"> • Meeting with the employee for a minimum of a ½ hour every other week • Introducing the new employee to at least one person outside of the department per week • Occasionally going to lunch with the new employee • Encourage the employee to complete the 60 & 90 day Onboarding evaluations 	
	<input type="checkbox"/> At the end of 60 days, review achievements against expectations to date with the new employee. Give constructive performance feedback early and often to the new employee, find at least two things to recognize the employee during the first 60 days	
	<input type="checkbox"/> Use approximately the 60 day point as a checkmark... <ul style="list-style-type: none"> • Is this person the right person for the job? Are they the right fit? • Do they have the skills they “sold” during the interview process? • If things are not good and are not working out, involve HR to develop an improvement plan or to begin planning an exit strategy. 	
	<input type="checkbox"/> Complete a minimum of one conversation with the employee related to the Work Profile and Individual Development Plan	
	<input type="checkbox"/> Ensure employee is performing meaningful work/tasks, is completing the onboarding and training plans in a timely manner, and is getting the needed support from you, the mentor and others	
	<input type="checkbox"/> Discuss training completed with the new employee, then schedule employee for at least one additional development item/training every other week during this phase What development items will you provide for the new employee? <ul style="list-style-type: none"> • 	
	<input type="checkbox"/> Give performance feedback early and often to the new employee, find at least two things during the first 90 days to recognize the employee for.	
	<input type="checkbox"/> Near the end of this 90-day phase, give a brief evaluation of how the employee is performing, identify areas of strength and opportunity, review the performance management process, and reiterate how performance is measured	
	<input type="checkbox"/> Celebrate the completion of the first 90 days with the employee!!!	