



Departmental New Employee Checklist

Employee Name: _____ Start Date: _____

PREARRIVAL	Who	Date completed
<p>Communicate Information</p> <ul style="list-style-type: none"> <input type="checkbox"/> Send Welcome Email to new employee, including: <ul style="list-style-type: none"> • Position Information – title, salary, supervisor, when & where to report, and meal breaks. <i>(See department procedures below.)</i> • Where to park on the first day. • Applicable New Employee Checklist and Invitation to visit New Employee Resources webpage: https://www.utdallas.edu/hr/employment/new/ • Instructions to complete new hire paperwork in Human Resources. <i>(Specific information found on the applicable New Employee Checklist.)</i> <input type="checkbox"/> Call new employee to confirm start date, place, etc. <input type="checkbox"/> Send internal memo to the department announcing new employee's arrival date and duties. <input type="checkbox"/> Submit appropriate eCAT for computer access, comet card and key requests 	<p>Department Supervisor (Hiring Manager)</p> <p>Human Resources Hiring Manager</p> <p>Hiring Manager</p> <p>Department designee</p>	
<p>Prepare the Work Area</p> <ul style="list-style-type: none"> <input type="checkbox"/> Ensure cleanliness & order of work area <input type="checkbox"/> Order: <ul style="list-style-type: none"> • basic supplies. name plate & business cards, if appropriate • procurement card, if appropriate • office keys, if needed • telephone installation and assign number (or complete change order) <input type="checkbox"/> Arrange for computer & software installation 	<p>Department Supervisor/ department designee</p>	
<p>Assemble a New Employee Packet (suggested items, not necessarily all inclusive)</p> <ul style="list-style-type: none"> <input type="checkbox"/> Welcome Letter from Department (see Appendix A for template) <input type="checkbox"/> Copy of job description <input type="checkbox"/> Department structure and priorities <ul style="list-style-type: none"> • Statement of department goals/mission/vision • Department organization chart & phone list • Campus map • List of applicable department projects, initiatives, etc. • Training Schedule, as applicable <input type="checkbox"/> Department procedures & guidelines <ul style="list-style-type: none"> • Personnel guidelines • Attendance expectations, normal work hours/time report & procedures • Meal breaks/work breaks • Workplace attire • Conflict of interest • Work environment, emergency and safety procedures • Parking procedures & building access procedures • Telephone/email policies • Office supply order procedure <input type="checkbox"/> UTD phone directory online <input type="checkbox"/> DART transit information and maps 	<p>Department Supervisor/ department designee</p>	
<p>Plan First Day</p> <ul style="list-style-type: none"> <input type="checkbox"/> Create plan of action for 1st day <ul style="list-style-type: none"> • Identify a meaningful first work assignment or first day activities • Arrange for meeting with appropriate person in the department for the first day • Plan to take the new employee to lunch 	<p>Department Supervisor (Hiring Agent)</p>	



<input type="checkbox"/> Schedule, if appropriate, a mentor (see below) <input type="checkbox"/> Finalize Work Area <input type="checkbox"/> Set-up Appropriate/Applicable Schedule for Training <ul style="list-style-type: none"> • Technical Training – procedures, forms, job specific skills, etc. • Business Operations – PeopleSoft, One Card, Procurement, Leadership/Management/Supervisor Skills Training • Other Department Specific Training 		
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ARRIVAL OF NEW EMPLOYEE		
DURING THE FIRST DAY		
<input type="checkbox"/> Greet the employee & introduce him/her to co-workers & work areas <input type="checkbox"/> Information review (New Employee Packet, New Employee Checklist) <input type="checkbox"/> Review job description <input type="checkbox"/> Review process to obtain UT Dallas Comet Card <input type="checkbox"/> Review Emergency Procedures and Safety Information <input type="checkbox"/> Review IT Helpdesk computer support, as applicable	Department Supervisor/ or department designee, as appropriate	
<input type="checkbox"/> Assign first project & schedule specific feedback session <input type="checkbox"/> Review the first-week schedule of activities & assignments <input type="checkbox"/> Introduce to Mentor, if using the mentor approach <input type="checkbox"/> Review applicable probationary status.	Department Supervisor	
DURING THE FIRST WEEK		
<input type="checkbox"/> Review training plan with new employee <ul style="list-style-type: none"> • Technical Training • Business Operations • Leadership/Management/Supervisor Skills Training • Other Department Specific Training 	Department Supervisor	
<input type="checkbox"/> Check in with the new employee to review the department structure & priorities section of the welcome packet <ul style="list-style-type: none"> • Statement of department vision/mission/goals • Department organization chart • Department phone list • Campus Map • List of all current department projects & priorities • The new employee's relationship with other roles in the department <input type="checkbox"/> Describe customer service & performance expectations for the University & Department (Schedule for Catch Comet Pride training) <input type="checkbox"/> Team Review—review teamwork expectations; set up 1:1 meetings with team members and other resources	Department Supervisor/ or department designee, as appropriate	
DURING THE FIRST MONTH		
<input type="checkbox"/> Meet with the new employee to answer questions and insure that the new employee is becoming acclimated to the department and position responsibilities <input type="checkbox"/> Discuss the guiding principles and how the new employee has seen them “in action” within the department <input type="checkbox"/> Insure that the employee has signed up for benefits (where applicable) <input type="checkbox"/> Ensure attendance at the New Employee Orientation (where applicable)	Department Supervisor	



<ul style="list-style-type: none"> <input type="checkbox"/> Assist new employee with creating a performance plan (see https://www.utdallas.edu/hr/er/performance/ for information) <input type="checkbox"/> Conduct 30 day performance appraisal: https://www.utdallas.edu/hr/download/ 		
DURING THE FIRST 90 DAYS		
<ul style="list-style-type: none"> <input type="checkbox"/> At the end of 3 months, 90-day Performance Appraisal https://www.utdallas.edu/hr/download/ 	Department Supervisor	
ONE MONTH PRIOR TO THE END OF PROBATIONARY PERIOD		
<ul style="list-style-type: none"> <input type="checkbox"/> Conduct performance appraisal - https://www.utdallas.edu/hr/download/ <input type="checkbox"/> Meet with the employee to review performance <input type="checkbox"/> Determine probationary status of new employee (see UTD Policy # UTDBP3091 - https://policy.utdallas.edu/utdbp3091) 	Department Supervisor	
AFTER PROBATIONARY PERIOD		
<ul style="list-style-type: none"> <input type="checkbox"/> Celebrate the completion of the probationary period <input type="checkbox"/> Regularly review progress of the employee according to UTD Policy # UTDBP3091 - https://policy.utdallas.edu/utdbp3091 	Department Supervisor	



Appendix A: Welcome Letter Template

The following template is an example of a cover letter that can be used with the welcome packet for new employees. This would be delivered to the new employee on the first day of their employment for review with the department supervisor and/or the department designee.

WELCOME TO THE UNIVERSITY OF TEXAS AT DALLAS !

TO: <Name of New Employee>

FROM: <Department Manager>
<Designated Staff Assistant>

RE: New Employee Orientation in the Department

DATE: <Date>

Welcome to the <Department name>. We are delighted to have you join us and look forward to helping you transition into this new position.

The purpose of <Department name> is <Department mission statement>. The unique knowledge and skills you bring to this position will help us meet our mission. Your new job may seem a bit unfamiliar at first. There are always things to learn. Your supervisor will do everything possible to help you get started. Make sure to ask questions.

We have a great team and you will enjoy getting to know them. To help you remember the name of some of our team members that will be helpful to you, we created a small list:

Your Supervisor	<NAME>
Your Department Manager:	<NAME>
Your Divisional Leadership	<NAME(S)>
The University President	Richard Benson

Some of the other people you will want to remember are:

Department Coordinator	<NAME>
Individuals you will work closely with	<NAME(S)>

<NAME> has been here long enough to know our work and our department very well. She/he can also answer many of the questions you might have.

We have prepared the attached packet of information to help you get acquainted with our department. Our first task today will be to review this information with you and to answer any questions you have.

We look forward to working with you.