**Pre-Hire Checklist**

The checklist below will guide you through key tasks to complete prior to your new hire’s first day.

**Administrative**

* *Ensure HR has received the new employee’s appointment form/RTF* (be sure to choose a hire date that allows for all approvals to be completed and for HR to process paperwork). And new hire has been assigned a Banner ID#.
* Create a transition plan for the new employee and those currently handling the tasks of the position. Define a timeline for how each task will transition to the new employee, who will be responsible for training, and who will communicate the plan to departments and colleagues across campus. A clear plan will set the expectations for the employee and assist them in being successful.
* Add new employee to Google calendars for the department. Have the appropriate co-workers and colleagues share their google calendar with the new employee. Add them to any upcoming or reoccurring meetings you would like them to attend.
* Update internal communications, distribution lists, email lists, organizational charts, and other communication channels with the employee’s contact info.

**Technology**

* Get the employee’s office phone set up and make sure all of their information is added to People Search by completing the [People Search Update Request Form](https://oswego.service-now.com/sp?id=sc_cat_item&sys_id=3805716213e4bb40d9895dcf3244b0f7).
* Order employee’s computer and other necessary equipment.
* Request system accesses that the employee will need to perform their job.

**Workspace**

* Order keys and security codes, if applicable to position.
* Order nameplate, nametag, and/or business cards, if applicable to position.
* Prepare the employee’s workspace: set up, make sure it is clean and organized.

**Supplies**

* Request procurement card, travel card, etc., if applicable to the position.
* Make sure necessary supplies are available. Plan to ensure that new employees have all the required office supplies on their first day, including pens, paper, post-its, etc.

**Work Assignments**

* Plan initial assignments. Be sure the employee has the tools and information needed to complete their first assignment successfully. This will set the tone for productive supervisor-employee interactions to come.

**Welcome Plan**

* Plan a get-together, such as a coffee break or meet and greet, to welcome the new employee as appropriate to your department/team.
* Plan the new employee’s first lunch, including who will participate.
* Plan your schedule so you can spend time with your new hire on their first day. We

recommend spending time with them at the beginning and the end of the day.

* Select one of your employees to be a mentor/buddy for your new hire’s first few months.

**Communications**

* Stay in regular communication with your employee between the offer and the start date. Be sure to answer any questions the new employee may have.
* Send out an informal announcement to your department about their new team member. The following are some recommended details to include in your announcement:
* Name
* First day on the job
* Job title
* Where they worked prior to joining your team. (If a new hire, include prior employment information. If an internal transfer or promotion, provide information on their university career).
* Reporting structure information
* Provide new hire’s work email and phone number, if available
* Shortly before the start date, send your new employee an email that reduces as much uncertainty as possible. Items to included would be:
* Date and time to arrive the first day
* What to bring on the first day (what documents to bring to complete the I-9, etc,)
* Details on where to report and the name of the person that will be there to greet them
* Transportation and detailed parking information
* What to expect during the first days on the job (include a schedule for the first few days if possible)
* What to wear
* Options for lunch (better yet, arrange to either take them out to lunch or have a lunch gathering with co-workers/department.)

**Other**

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