



Mentor Checklist

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

When your new coworker arrives, inform him/her of your role. The mentor is not a substitute for the manager. Any work-related problems (other than general work procedures) should go through the manager. Answer the new employee's questions regarding the environment and basic procedures in a positive way. Try to provide as much information as you can to help the new employee feel comfortable in the new environment and let him or her know that you are available to answer questions as needed.

- Use this form to document key completion dates and progress.
- Please review the Discussion Form sample questions prior to formal meetings with the new employee

FIRST IMPRESSIONS (FIRST WEEK)

On the new employee's first days in the assigned work area, help acquaint the employee to his or her new environment by providing a tour of the following areas (as applicable for your department/work area):

FIRST IMPRESSIONS (FIRST WEEK)	Activity	Date Complete
	<input type="checkbox"/> Have supervisor introduce you to the new team member	
	<input type="checkbox"/> Set up a time for a first meeting with the employee to explain your role and plan as their mentor.	
	<input type="checkbox"/> Overview Relevant Work Related Locations <ul style="list-style-type: none"> • Areas where work goes to and from • Copier(s), printer(s), faxes • Other departments you work with • Mail room or deliver/pick up procedures • Recycling receptacles 	
	<input type="checkbox"/> Overview Other Locations <ul style="list-style-type: none"> • Break rooms • Local restaurants or other places they can eat • Restrooms • Information areas (HR materials, policies, benefits, etc.) • Supply area(s) • Conference rooms 	
<input type="checkbox"/> Meet with new hire for 15 minutes each day for the first week to discuss the to dos for the day		

GETTING ACQUAINTED (FIRST 30 DAYS)

As a mentor, you will spend a minimum of one hour per week to discuss what or how the new hire has been doing, answer any questions, provide coaching, and find out what the new hire has learned during his/her onboarding experience.

GETTING ACQUAINTED (FIRST 30 DAYS)	Activity	Date Complete
	<input type="checkbox"/> Meet with the new employee at least once per week to follow up and ensure they continue to assimilate and are expanding their knowledge and capabilities. <ul style="list-style-type: none"> ○ When will you meet? ○ What questions will you ask (See Mentor Discussion Form) ○ Put it on the calendar, inform the employee ○ Answer any questions the new employee has, take notes so you can follow up with the employee on action items during your next conversation 	
	<input type="checkbox"/> Invite your new colleague to lunch to get to know them. Do this at least once in this phase. <ul style="list-style-type: none"> ○ Put it on the calendar, inform the employee 	
	<input type="checkbox"/> Introduce the new employee to at least one person outside of your department each week during this period. Who will you introduce them to? <ul style="list-style-type: none"> • • • 	
	<input type="checkbox"/> Discuss training opportunities, and explain how they can take advantage of them and where they can find them	
	<input type="checkbox"/> Ensure employee is performing meaningful work/tasks, is completing the onboarding and training plans in a timely manner	
	<input type="checkbox"/> Complete onboarding discussion form for every formal session you complete with the new employee (http://www.in.gov/spd/2366.htm)	
	<input type="checkbox"/> Ensure new employee has completed the 30 day evaluation to assess their experience	
	<input type="checkbox"/> Near the end of this phase, meet with your manager to evaluate and identify how the new employee is doing, problems, etc.	

SETTLING IN (SECOND & THIRD MONTHS – DAYS 30-90)

As a mentor, you will spend a minimum of one hour every other week to discuss what or how the new hire has been doing, answer any questions, provide coaching and find out what the new hire has learned. Additionally, during this month you will help the new employee set up meetings with people from other departments so that the new employee better understands how the departments relate, how the agency works together, and where the new employee fits in with other departments.

SETTLING IN (SECOND & THIRD MONTHS – 30-90 DAYS)

Activity	Date Complete
<input type="checkbox"/> Meet with the new employee at least once every two weeks to follow up and ensure they continue to assimilate and are expanding their knowledge and capabilities. <ul style="list-style-type: none"> ○ When will you meet? ○ What questions will you ask (see Mentor Discussion Form for sample questions) ○ Put it on the calendar, inform the employee ○ Answer any questions the new employee has, take notes so you can follow up with the employee on action items during your discussion ○ Complete the Mentor Discussion Form 	
<input type="checkbox"/> Invite your new colleague to lunch to get to know them. Do this at least once in this phase. <ul style="list-style-type: none"> ○ Put it on the calendar, inform the employee 	
<input type="checkbox"/> Introduce the new employee to at least one person outside of your department each week during this period. Who will you introduce them to? <ul style="list-style-type: none"> • • • • • • 	
<input type="checkbox"/> Celebrate the completion of the first 60 days with the employee!!!	
<input type="checkbox"/> Ensure new employee has completed the 60 day evaluation to assess their experience	
<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 manager and others	
<input type="checkbox"/> Complete onboarding discussion form for every formal session you complete with the new employee (http://www.in.gov/spd/2366.htm)	
<input type="checkbox"/> Near the end of this phase, meet with your manager to evaluate execution and identify how the new employee is doing, problems, etc. Go over questions that the new employee asked to ensure they have been completed.	
<input type="checkbox"/> Celebrate the completion of the first 90 days with the employee!!!	
<input type="checkbox"/> Ensure new employee has completed the 90 day evaluation to assess their experience	