Purpose: This checklist will guide the Supervisor in effectively bringing a new employee on-board at the University. It can be used to integrate an existing employee who transfers into the work group as well. This checklist will walk you through the steps to successfully orient your new employee. *It is meant to guide, rather than restrict.* Not all items may be applicable to your area or to a transferred employee.

Note: As a Supervisor, you may choose to assign some tasks to a Mentor – *a co-worker with a good performance standing and a positive point of view.* However, ***where the Mentor's column is shaded, we highly recommend the supervisor maintain responsibility for the completion of these tasks.***

Instructions:
- Review the relevant items and plan time for the items on your schedule.
- Record the completion date for each item.
- When finished, place a copy in the employee's folder and mail a copy to Human Resources *at the end of the probationary period*.

Employee Name:	Title:	Hire Date:
Department:	Supervisor:	Mentor:

Pre-Arrival	Date Completed	
Call or email the new employee a few days before arrival to welcome and briefly inform of: ▪ Arrival time ▪ Location ▪ First day agenda ▪ Parking ▪ Dress code, etc. **If new employees:** *Remind to bring two forms of ID on the first day and to bring their license plate number.*		
Prepare the new employee's workstation: ▪ Supplies ▪ Phone ▪ Computer ▪ Printer connectivity ▪ Paper ▪ Pen and other writing untensils		

Inform the staff of the new team member, explain:
▪ The role
▪ The role relationship to existing members:
  – Leader/peer
  – Peer to peer		

– Intern, etc.		
Appoint an experienced, star employee to act as a Mentor and discuss the purpose of the role.		
Review the position Competency Profile and prepare a Work Plan form.		
Develop an *Employee Development Plan (EDP)*. Contact HR for training and guidance in developing a training plan.		
Identify training resources, ITS, HR, and Banner personnel to discuss training registration and timeframes.		
Create a week one orientation agenda for the new employee and provide a copy to the Mentor.		
Plan small work task for employee to perform on the first day of work.		
Arrange breakfast or lunch with new employee on the first day of work.		
First Day	**Date Completed**	
Welcome the employee (if possible make the welcome eventful).		
Take to breakfast or make plans for lunch.		
Bring new employee to HR to complete required paperwork.		
Walk new employee to the ID Office to ensure photo ID is obtained.		
Explain importance of ID badge.		
Take on tour of these University campus locations: ▪ Credit Union locations ▪ ATM Machines ▪ Faculty/Staff dining facility and other lunch options ▪ Library ▪ Post Office ▪ Interoffice Mail Drop ▪ Book Store ▪ Parking Services		
Inform new employee of the free campus shuttle service.		
Take building tour: ▪ Work facilities ▪ Washrooms ▪ Break room ▪ Copier, etc.		
Introduce new employee to team members (or direct reports and management team).		
Provide door keys and explain office security and policies.		
Clarify unofficial office do's and don'ts.		
Share any other necessary or advantageous information.		
Share information about the academic environment.		

First Week		Date Completed

Explain operation of office equipment and terms:
    ▪ **Phone**:
        – Voicemail
        – Standard message
        – Phone directory
    ▪ **Computer:**
        – Username
        – Password
        – Email account
        – Signature
    ▪ **Other equipment:**
        – Copier
        – Fax, etc.
        – Departmental Acronyms		

Provide a Student/Faculty/Staff Directory.		
Provide guidance and instructions for accessing email off campus.		
Review the job description.		
Discuss how the new employee's role contributes to the overall success of the University and the Department.		

Discuss time and attendance reporting:
    ▪ Weekly timesheet
    ▪ Application for Leave (vacation, sick, etc.)
    ▪ Inform employee about their position (EHRA, SHRA, exempt or non exempt)		

Explain communication channels:
    ▪ Bulletin Boards
    ▪ Websites
    ▪ Campus News
    ▪ Departmental Website		

Explain the Department's mission/vision and goals and provide the department organizational chart.		

Review work plan form and probationary period:
    ▪ Discuss critical functions and expected performance standards and outcomes.
    ▪ Clarify expected work habits and ethics (see Behavioral Competencies).		

Help new employee get registered for necessary training.		
Discuss workplace safety and emergencies.		
Discuss and complete required Environmental Health and Safety information.		
Review applicable State, University, and Department policies and procedures and encourage reviewing of the online SPA or EPA handbook.		
Ensure new employee completes paperwork for direct deposit.		

First Month	Date Completed	
Devote time to listen to comments, concerns, and observations. Provide clarity to employee's questions and concerns.		
Review and modify EDP as needed.		

Discuss:
   ▪ Working agreements
   ▪ Leadership style
   ▪ Communication preferences		

Discuss protocol for handling issues/concerns.		
Ensure that new employee finishes the HR 49er Connect Online New Employee Orientation Modules – Parts 1 thru 6.		
Follow-up after new employee attends HR Orientation.		
Schedule monthly coaching sessions during the six month probation.		
Two to Six Months	**Date Completed**	
Continue to coach for success.		
Review and modify EDP as needed.		
Determine probationary status and discuss with employee.		

Complete and return the following documents to Human Resources:
   ▪ Functional Competency Assessment
   ▪ Probationary documentation
   ▪ This checklist
For additional help with these forms, please contact Amy Braun or Hal Walkter.		