

Student Affairs New Employee Human Resources Orientation Checklist

Employee's First and Last Name:	HR Representative:	Date:
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PRE-ORIENTATION CHECKLIST *(complete 1-2 weeks prior to start date)*

Use this checklist as a guide to help you successfully prepare for your new employee prior to their start date so that they can have a memorable welcoming!

	TASK	INFORMATION AND RESOURCES	TASK LEADER
<input type="checkbox"/>	Notify new employee of job offer	Department HR will provide offer letter to new employee.	Manager/Human Resources
<input type="checkbox"/>	Schedule new employee for on-boarding paperwork and orientation <i>(1-2 weeks prior to start date)</i>	Contact new employee to schedule appointment for on-boarding paperwork and orientation. <ul style="list-style-type: none"> • Prepare new hire paperwork and orientation packet • Mail out new hire paperwork to employee (if applicable) • Inform employee of documents to bring for I-9 • Schedule background check (if applicable) • Schedule medical test (if applicable) • Request DMV Record (if applicable) • Create Probationary Period Evaluation Reminder for Manager/Supervisor/Employee • Update Org chart (if applicable) • Add employee to department and/or unit organization contact and routing lists • Create personnel file • Service Credit 	Human Resources
<input type="checkbox"/>	Notify Payroll Team	Coordinate with unit's Payroll Team to set up appropriate time management system and training for new employee.	Human Resources & Unit Payroll Team
<input type="checkbox"/>	Notify Business Operations Safety Coordination Team <i>(1-2 weeks prior to start date)</i>	Contact unit's Business Operations Safety team to review Safety and Emergency Preparedness and appropriate safety trainings with new employee.	Human Resources & Business Services Safety Coordination Team

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	TASK	INFORMATION AND RESOURCES	TASK LEADER
<input type="checkbox"/>	Ergonomics @ Work	Contact unit's Business Operations Ergonomic Evaluators to introduce new employee to the Ergonomics@Work Program. Review the University Health Services web site (uhs.berkeley.edu).	Human Resources & Business Services Ergonomic Evaluators
<input type="checkbox"/>	Notify Student Affairs Information Technology (SAIT) Center of hire <i>(1-2 weeks prior to start date)</i>	Coordinate with Student Affairs IT at SAITservice@berkeley.edu for new employee to have appropriate computer set up, hardware, software, network and issue of CalNet ID token.	Human Resources & SAIT
<input type="checkbox"/>	Parking & Transportation	If needed, help new employee coordinate parking and transportation until they can get a CalNet ID and campus permit.	Human Resources
<input type="checkbox"/>	Notify Business Operations Office Services	Contact unit's Business Operations Office Services (campuslife.berkeley.edu/busops) for office needs.	Human Resources/Office Services
<input type="checkbox"/>	Additional:		
<input type="checkbox"/>	Additional:		
<input type="checkbox"/>	Additional:		

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POST-ORIENTATION CHECKLIST *(complete 1-2 weeks prior to start date)*

Use this checklist after one month of hire date to give clear performance feedback and identify any opportunities to ensure a mutually successful relationship with the employee.

	TASK	INFORMATION AND RESOURCES	TASK LEADER
<input type="checkbox"/>	Send Period Initial Eligibility Benefits Reminder	Send Period Initial Eligibility Benefits Reminder to employee regarding benefits enrollment.	Human Resources
<input type="checkbox"/>	Performance Evaluation Reminder for Manager/Supervisor/Employee	Schedule a reminder in the Manager/Supervisor/Employee's bCal.	Human Resources
<input type="checkbox"/>	Check In	Send a quick e-mail to check in with new employee.	Human Resources
<input type="checkbox"/>	New Employee Institute	Check to make sure employee is attending New Employee Institute.	Human Resources
<input type="checkbox"/>	Classification Performance	Verify turned in sign job description and Physical, Environment and Mental Demands (PEM) form to HR.	Human Resources
<input type="checkbox"/>	Payroll	Receive Comp Time election form <i>(if applicable)</i>	Human Resources
<input type="checkbox"/>	Additional:		
<input type="checkbox"/>	Additional:		

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ORIENTATION CHECKLIST *(within 1-2 weeks of hire date)*

Use this checklist as a guide to orient your new employee to your department and the University. Please provide employee with a copy so that they can write their comments and notes.

	TASK	INFORMATION AND RESOURCES
<input type="checkbox"/>	General Overview	Review the following information with the new employee: <ul style="list-style-type: none"> • Student Affairs Mission (campuslife.berkeley.edu/studentaffairs) • Principles of Community (berkeley.edu/about/principles.shtml) • Statement of Ethics (www.ucop.edu/ucophome/coordev/policy/Stmt_Stds_Ethics.pdf)
<input type="checkbox"/>	Policies Overview	Review relevant and important UCB policies: <ul style="list-style-type: none"> • Demonstrate Policy/Bargaining Agreement web site <i>(if applicable)</i> (atyourservice.ucop.edu/employees/policies_employee_labor_relations/collective_bargaining_agreements.html) • Provide copy of Drug and Alcohol Policy (police.berkeley.edu/rules/alcohol_drug_laws_and_policies.html)
<input type="checkbox"/>	Access Overview	Explain relevant access needs and new employee tasks: <ul style="list-style-type: none"> • Explain CalNet ID (calnet.berkeley.edu) • Explain Cal 1 Card (services.housing.berkeley.edu/c1c/static/index.htm) • Explain bCal (bcal.berkeley.edu) • Explain bMail (bmail.berkeley.edu)
<input type="checkbox"/>	Benefits	Review relevant UC Benefits information: <ul style="list-style-type: none"> • Demonstrate At Your Service (atyourservice.ucop.edu) • Describe benefits • Period of Initial Eligibility _____ • Describe Savings and Retirement Plans (hrweb.berkeley.edu/benefits/retirement-savings) • Retirement Plans • Beneficiary Designations

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	TASK	INFORMATION AND RESOURCES
<input type="checkbox"/>	Payroll	Review relevant payroll information: <ul style="list-style-type: none"> • Rate of pay, salary range, shift differential, overtime, on-call, callback • Paycheck schedule • Holiday schedule • Curtailment • Review vacation accrual and usage • Review sick leave accrual and usage • Review overtime and comp time policies • Provide comp time election form <i>(if applicable)</i> • Demonstrate Blu <i>(if applicable)</i> • Direct deposit sign up • Address changes • W-2 • W-4 • Online earning statement • Review time management system
<input type="checkbox"/>	Classification and Performance	Review relevant classification and performance with new employee: <ul style="list-style-type: none"> • Provide copy of job description & sign <i>(if applicable)</i> • Provide PEM & sign <i>(if applicable)</i> • Provide blank performance evaluation • Probationary period end date: _____
<input type="checkbox"/>	Training and Employee Services	Direct new employee to relevant training and employee services: <ul style="list-style-type: none"> • UCB Learning Center • Sign up for campus New Employee Orientation • Sexual harassment Training (supervisors) • Ethics training • Career Place • Ombuds Office (staffombuds.berkeley.edu) • OHR Employee Relations (hrweb.berkeley.edu/er) • CARE Services (uhs.berkeley.edu/facstaff/care) • Whistleblowers • Business Operations web site (campuslife.berkeley.edu/busops)

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	TASK	INFORMATION AND RESOURCES
<input type="checkbox"/>	Campus	Provide information on parking, biking, public transportation (pt.berkeley.edu/around/transit), campus shuttle, campus map, and demonstrate Wage Works.
<input type="checkbox"/>	Campus Amenities	<p>Provide information on campus amenities:</p> <ul style="list-style-type: none"> • Access to libraries, museums, performances, etc. • Recreational Sports Facility • Wellness programs
<input type="checkbox"/>	SAIT Overview	<p>Orient employee on SAIT's support services and resources. Help employee with the following:</p> <ul style="list-style-type: none"> • Set up CalNet ID (<i>if applicable</i>) • Set up e-mail/Outlook • Set up bCal • Business systems accounts (<i>if applicable</i>) • Computer security training (<i>if applicable</i>) • Information security form (<i>send to department human resources</i>)
<input type="checkbox"/>	Business Operations Safety Team Overview	<p>Review safety and emergency preparedness:</p> <ul style="list-style-type: none"> • Review building evacuation plan (<i>provide copy</i>) • Describe role in business resumption (<i>if applicable</i>) • Review injury and illness prevention plan (<i>provide copy</i>) • Review appropriate safety information
<input type="checkbox"/>	Ergonomics@Work	Business ergonomic evaluators conduct evaluation on employee, review ergonomics program
<input type="checkbox"/>	Additional:	
<input type="checkbox"/>	Additional:	

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	TASK	INFORMATION AND RESOURCES
<input type="checkbox"/>	Additional:	
<input type="checkbox"/>	Additional:	
<input type="checkbox"/>	Additional:	

I have reviewed and successfully completed all information in this checklist.

Employee Signature: _____

Date: _____

HR Signature: _____

Date: _____

Student Affairs New Employee Human Resources Orientation Checklist



The Student Affairs Vision, Mission and Values

The Student Affairs Vision

The Division of Student Affairs will give every student a remarkable experience that is unsurpassed in preparing them to transition into global citizens.

Student Affairs Mission

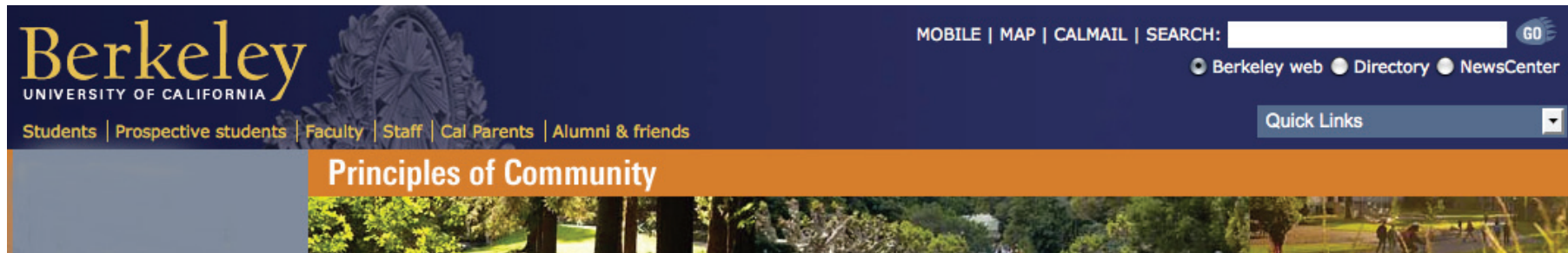
The Division of Student Affairs advances the learning and personal growth of students by providing leadership, services, and opportunities that enable students to succeed in and contribute to a diverse and global society.

Student Affairs Values

The Division of Student Affairs is dedicated to:

- Promoting access to UC Berkeley for students representing the diverse ethnic, racial and economic profile of the State of California,
- Delivering high quality services to students that meet their academic, leadership and career goals through collaboration with faculty and other campus departments
- Creating dynamic living and learning communities that promote intellectual curiosity, exchange, and debate,
- Promoting a work environment where staff is valued and respected,
- And honoring diversity and fostering mutual respect among students, faculty, and staff by encouraging a culture of understanding, belonging and civility.

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University of California, Berkeley Principles of Community

These principles of community for the University of California, Berkeley, are rooted in our mission of teaching, research and public service. They reflect our passion for critical inquiry, debate, discovery and innovation, and our

deep commitment to contributing to a better world. Every member of the UC Berkeley community has a role in sustaining a safe, caring and humane environment in which these values can thrive.

- We place honesty and integrity in our teaching, learning, research and administration at the highest level.
- We recognize the intrinsic relationship between diversity and excellence in all our endeavors.
- We affirm the dignity of all individuals and strive to uphold a just community in which discrimination and hate are not tolerated.
- We are committed to ensuring freedom of expression and dialogue that elicits the full spectrum of views held by our varied communities.
- We respect the differences as well as the commonalities that bring us together and call for civility and respect in our personal interactions.
- We believe that active participation and leadership in addressing the most pressing issues facing our local and global communities are central to our educational mission.
- We embrace open and equitable access to opportunities for learning and development as our obligation and goal.

UC Berkeley's "Principles of Community" statement was developed collaboratively by students, faculty, staff, and alumni, and issued by the Chancellor. Its intent is to serve as an affirmation of the intrinsic and unique value of each member of the UC Berkeley community and as a guide for our personal and collective behavior, both on campus and as we serve society.

These principles do not replace existing personnel policies and codes of conduct:

- Campus Administrative Policies and Procedures**
- Code of Student Conduct**
- Faculty Code of Conduct**
- Staff Personnel Policies**
- Academic Personnel Manual**

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The University of California Statement of Ethical Values and Standards of Ethical Conduct

(May, 2005)

The University's Statement of Ethical Values and Standards of Ethical Conduct commits everyone in the UC community to the highest ethical standards in furtherance of the University's mission of teaching, research, and public service. It identifies the University's core ethical values as integrity, excellence, accountability, and respect.

In summary, we are committed to the following:

1. **Fair Dealing.** We will always conduct ourselves ethically, honestly, and with integrity.
2. **Individual Responsibility and Accountability.** We will accept responsibility appropriate to our positions and delegated authorities.
3. **Respect for Others.** We will treat everyone we contact with respect and dignity.
4. **Compliance with Applicable Laws and Regulations.** We will learn and abide by federal, state, and local laws that affect our campus roles.
5. **Compliance with Applicable University Policies, Procedures and Other Forms of Guidance.** We will learn and abide by University and campus policies and procedures that affect our campus roles.
6. **Conflicts of Interest or Commitment.** We will avoid both actual conflicts of interest and the appearance of such conflicts, and devote our primary professional allegiance to the University and its mission of teaching, research, and public service.
7. **Ethical Conduct of Research.** We will conduct our research with integrity and intellectual honesty, and show the greatest care for human or animal subjects.
8. **Records: Confidentiality/Privacy and Access.** We will follow applicable laws and University policies when accessing, using, protecting, or disclosing records.
9. **Internal Controls.** We will ensure that internal controls are established, properly documented, and maintained for activities within our jurisdictions.
10. **Use of University Resources.** We will ensure that campus resources are used only on behalf of the University.
11. **Financial Reporting.** We will ensure that accounting and financial records are accurate, clear, and complete.
12. **Reporting Violations and Protection from Retaliation.** We will report all known or suspected improper governmental activities under the provisions of the University's Whistleblower Policy, recognizing that everyone is protected from retaliation for making such reports under the Whistleblower Retaliation Policy.