

New Employee Orientation Checklist for Supervisors

RSSP & SAIT

Employee's First and Last Name:	Supervisor:	Date:
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PRE-ORIENTATION CHECKLIST (complete one to two 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 Human Resources of hire	Submit BIZeBEARS ticket to request to hire employee.	Manager
<input type="checkbox"/>	HR assessment	Inform Department HR of pre-employment tasks: <ul style="list-style-type: none"> • DMV records request <i>(if applicable)</i> • Medical tests <i>(if applicable)</i> • Background check <i>(if applicable)</i> 	Manager
<input type="checkbox"/>	Notify new employee of job offer	Work with department HR to provide offer letter to new employee.	Manager/Human Resources
<input type="checkbox"/>	Welcome call or e-mail to new employee	Contact new employee prior to reporting to work: <ul style="list-style-type: none"> • Serve as main point-of-contact for information, issues, or concerns • Information regarding site location including directions, dress, and accommodations • Instructions about what to expect for first day and department's orientation • Links to relevant websites 	Manager
<input type="checkbox"/>	New employee training	Complete orientation schedule and identify needed outside and/or departmental trainings for new employee. Examples: <ul style="list-style-type: none"> • BIZeBEARS • Bear Buy • Blu Card/Event Card 	Manager

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	TASK	INFORMATION AND RESOURCES	TASK LEADER
<input type="checkbox"/>	Notify functional groups of new hire	<p>Send an announcement of new hire to all relevant internal groups and campus partners.</p> <p>Sample e-mail: Dear Colleagues, It is my pleasure to welcome (NAME) to (program/unit) as (working title). (Name) joins us following (indicate relevant previous experience). Please join me in welcoming (name) to the Berkeley community. He/she can be reached at (e-mail) and (phone number). Sincerely, Manager</p>	Manager
<input type="checkbox"/>	Welcome banner or card	<p>In functional group, create and sign welcome banner or card for new employee.</p>	Manager
<input type="checkbox"/>	Peer mentor/buddy selection	<p>If requested by employee, select a peer mentor from functional team. A peer mentor is usually someone on the same team as the new hire, or at least within the same function. A mentor must be a strong performer, a good communicator, and someone who demonstrates the unit's values.</p>	Manager
<input type="checkbox"/>	Parking and transportation	<p>If needed, help new employee coordinate parking and transportation until they can get a CalNet ID and campus permit.</p> <ul style="list-style-type: none"> • Provide information on parking, biking public transportation (pt.berkeley.edu/around/transit), campus shuttle, campus map, etc. • Demonstrate Wage Works 	Manager
<input type="checkbox"/>	Computer setup and software	<p>Coordinate with Student Affairs IT (SAITservice@berkeley.edu) for new employee to have appropriate computer setup, hardware, software and network.</p>	Manager & SAIT
<input type="checkbox"/>	Workspace preparation and supplies	<p>Coordinate with unit's Business Services at campuslife.berkeley.edu/busops to ensure new employee is well prepared on their first day by preparing their workspace:</p> <ul style="list-style-type: none"> • Workspace is clean and supplies are stocked • Name badges and name plates (<i>if applicable</i>) • Uniforms (<i>if applicable</i>) • Department mailbox 	Manager

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	TASK	INFORMATION AND RESOURCES	TASK LEADER
<input type="checkbox"/>	Building access	Coordinate with unit's Business Services at campuslife.berkeley.edu/busops to arrange for appropriate building/office access for new employee. <ul style="list-style-type: none"> • Keys • Keypad codes • Building access code 	Manager
<input type="checkbox"/>	Employment paperwork and orientation	Work with department HR to schedule new employee for employment paperwork and orientation. <ul style="list-style-type: none"> • Contact new employee to schedule appointment for employment paperwork and orientation 	Manager
<input type="checkbox"/>	Additional:		
<input type="checkbox"/>	Additional:		
<input type="checkbox"/>	Additional:		
<input type="checkbox"/>	Additional:		

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ORIENTATION CHECKLIST *(complete within one week prior to hire date)*

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

	TASK	INFORMATION AND RESOURCES	TASK LEADER
<input type="checkbox"/>	Departmental mission, vision, values and organization charts	<ul style="list-style-type: none"> Review department mission, vision, values Review current departmental goals Review relevant organization charts 	Manager and Human Resources
<input type="checkbox"/>	Office culture	Review office culture with new employee: <ul style="list-style-type: none"> Personal appearance Personal conduct, code of ethics/behavior, confidentiality Phone etiquette Unit practices, etc. Staff meetings 	Manager
<input type="checkbox"/>	Networking calendar	Set up networking meetings for new employees to meet staff and campus partners. <i>(if applicable)</i>	Manager
<input type="checkbox"/>	Job-specific duties	Review job description and Physical, Environmental, and Mental Demands (PEM) form: <ul style="list-style-type: none"> Have employee sign job description and PEM, and put original in personnel file along with the application 	Manager
<input type="checkbox"/>	Work procedures	Describe relevant work procedures to new employee: <ul style="list-style-type: none"> Work hours and schedule Procedure for notification for time off Steps to resolving problems and conflicts 	Manager
<input type="checkbox"/>	Performance expectations and evaluation methods and the probationary period	Along with a clear job description and PEM, provide the employee with clear performance expectations and objectives so the employee understands what is expected and how he/she will be measured. Discuss the probationary period.	Manager

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	TASK	INFORMATION AND RESOURCES	TASK LEADER
<input type="checkbox"/>	ID card issued & CalNet token obtained	After the HRMS hiring notification e-mail is received by the supervisor, the new employee must bring their employee ID number and photo identification (i.e. current driver's license, state ID, passport, etc.) to the Cal 1 Card (services.housing.berkeley.edu/c1c/static/index.htm) office to obtain a Cal ID and/or CalNet token. The Cal 1 Card Office is open from 9-5, M-F, at 180 César Chávez Center, Lower Sproul Plaza.	Manager and employee
<input type="checkbox"/>	Office supplies and machines	Review use of phones, fax machines, copiers, and other relevant work tools.	Manager
<input type="checkbox"/>	Tour	Provide new employee with tour of workspace and relevant sites on campus.	Manager
<input type="checkbox"/>	List serves	Request to add employee to applicable internal list serves and shared drives with HR and SAIT. <ul style="list-style-type: none"> • Explain list serves to employee 	Manager
<input type="checkbox"/>	Business Cards	Assist new employee in selecting and ordering business cards (if applicable).	Manager
<input type="checkbox"/>	UCB New Employee Orientation	Assist employee to register for UC Berkeley New Employee Orientation through the UC Learning Center (hrweb.berkeley.edu/toolkits/new-employees/orientation).	Manager
<input type="checkbox"/>	WarnMe Emergency Alert System	Have the new employee sign up at the WarnMe (warnme.berkeley.edu) web site. WarnMe is UC Berkeley's alerting and warning service for students, staff, and faculty. It is activated to contact you when there is an immediate threat to safety or health affecting the campus community.	Manager
<input type="checkbox"/>	Safety & emergency	Review safety and emergency preparedness: <ul style="list-style-type: none"> • Review building evacuation plan (provide copy if applicable) • Describe role in business resumption (if applicable) • Review Injury and Illness Prevention Plan (IPP) (provide copy) • Review appropriate safety information 	Manager

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	TASK	INFORMATION AND RESOURCES	TASK LEADER
<input type="checkbox"/>	Staff meetings	Add staff meetings to bCal or provide new staff member with a meeting calendar.	Manager
<input type="checkbox"/>	Systems access and training	Arrange for access and training to relevant tools and systems. Examples: (Active Directory, Star Res, bCal, Oscar, Universe, etc.)	Manager
<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) 	Manager
<input type="checkbox"/>	Policies overview	Review important department and campus policies and procedures and web sites. Examples: <ul style="list-style-type: none"> • Family Educational Rights and Privacy Act (FERPA) • Driving/vehicle policies • Sexual Harassment policy • Policy/Bargaining Agreement website (<i>if applicable</i>) (atyourservice.ucop.edu/employees/policies_employee_labor_relations/collective_bargaining_agreements.html) • Drug and Alcohol policy (police.berkeley.edu/rules/alcohol_drug_laws_and_policies.html) 	Manager
<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) 	Manager
<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 (if applicable) • Provide Physical, Environmental, and Mental Demands (PEM) & sign (if applicable) • Provide blank performance evaluation • Probationary period end date: _____ • Return signed job description and PEM form to personnel file 	Manager

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	TASK	INFORMATION AND RESOURCES	TASK LEADER
<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 Prevention 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 website (campuslife.berkeley.edu/busops) 	Manager
<input type="checkbox"/>	Campus amenities	Provide information on campus amenities: <ul style="list-style-type: none"> • Access to libraries, museums, performances, etc. • Recreational Sports Facility • Wellness programs 	Manager
<input type="checkbox"/>	SAIT overview	Review and refer employee to SAIT’s support services and resources. Help employee with the following: <ul style="list-style-type: none"> • Set up CalNet ID (<i>if applicable</i>) • Set up bMail • Set up bCal • Business System Accounts (<i>if applicable</i>) • Computer Security Training (<i>if applicable</i>) • Information Security Form 	Manager
<input type="checkbox"/>	Ergonomics @Work	Review and refer employee to the Ergonomics Program <ul style="list-style-type: none"> • Business Ergonomic Evaluators conduct evaluation (uhs.berkeley.edu/facstaff/ergonomics) 	Manager
<input type="checkbox"/>	Benefits reminder	Remind employee to enroll in benefits. Eligible employees are sent a welcome letter and benefits package within five days of hire. Employee has 31 days from date of hire to sign up for benefits.	Manager
<input type="checkbox"/>	Additional:		

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POST-ORIENTATION CHECKLIST

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 new employee.

	TASK	INFORMATION AND RESOURCES	TASK LEADER
<input type="checkbox"/>	Schedule three-month performance review	Evaluate the employee's performance in accordance with applicable policies, procedures, and contracts. This should be done in writing.	Manager and employee
<input type="checkbox"/>	Schedule six month performance review	Evaluate the employee's performance in accordance with applicable policies, procedures, and contracts.	Manager and employee
	Create professional development plan	Create a professional development plan.	Manager and employee
<input type="checkbox"/>	Post orientation check in	Input a tab in the Manager/Employee's bCal as a reminder to check-in. <i>(two to four weeks after orientation)</i>	Manager
<input type="checkbox"/>	Additional		

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

Employee Signature: _____ Date: _____

Supervisor Signature: _____ Date: _____

