

# New Employee Checklist

# PRE-ORIENTATION

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"/>	<b>Notify Human Resources that position needs to be filled.</b>	Submit Hire Request/Position Control Request (refer to Recruitment Task List for details)	Manager
<input type="checkbox"/>	<b>Interview/Candidate Selection</b>	Create interview questions. Review resumes, select and interview candidates. Select successful candidate. (refer to Recruitment Task List for details)	Manager/Human Resources
<input type="checkbox"/>	<b>Notify new employee of job offer</b>	Work with department HR to provide offer letter to new employee. (refer to Recruitment Task List for details)	Manager/Human Resources
<input type="checkbox"/>	<b>Welcome e-mail to new employee</b>	Contact new employee prior to reporting to work: <ul style="list-style-type: none"> <li>• Serve as main point-of-contact for information, issues, or concerns</li> <li>• Information regarding site location including directions, uniform (if applicable), and accommodations</li> <li>• Instructions about what to expect for first day and department's orientation</li> </ul>	Human Resources
<input type="checkbox"/>	<b>New employee training</b>	Complete orientation schedule and identify needed outside and/or departmental trainings for new employee. Examples: <ul style="list-style-type: none"> <li>• Maximo</li> <li>• Bear Buy</li> <li>• Blu Card/Event Card</li> <li>• Any job or Unit specific training</li> </ul>	Manager

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	TASK	INFORMATION AND RESOURCES	TASK LEADER
<input type="checkbox"/>	<b>Notify functional groups of new hire</b>	<p>Work with AVC's assistant to send an announcement of new hire to all relevant internal groups and campus partners.</p> <p><b>Sample e-mail:</b> 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"/>	<b>Peer mentor/buddy selection</b>	<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"/>	<b>Parking and transportation</b>	<p>If needed, provide information to new employee regarding parking and transit options.</p> <ul style="list-style-type: none"> <li>• Provide information on parking, biking public transportation (<a href="http://pt.berkeley.edu/around/transit">pt.berkeley.edu/around/transit</a>), campus shuttle, campus map, etc.</li> <li>• Demonstrate Wage Works</li> </ul>	Manager
<input type="checkbox"/>	<b>Computer setup and software</b>	<p>Coordinate with FSIT (<a href="mailto:fsithelp@berkeley.edu">fsithelp@berkeley.edu</a>) for new employee to have appropriate computer setup, hardware, software and network.</p>	Manager & FSIT
<input type="checkbox"/>	<b>Workspace preparation and supplies</b>	<p>Ensure new employee is well prepared on their first day by preparing their workspace:</p> <ul style="list-style-type: none"> <li>• Workspace is clean and supplies are stocked</li> <li>• Name badges and name plates (<i>if applicable</i>)</li> <li>• Uniforms (<i>if applicable</i>)</li> <li>• Department mailbox</li> </ul>	Manager

	TASK	INFORMATION AND RESOURCES	TASK LEADER
<input type="checkbox"/>	<b>Building access</b>	<p>Coordinate with <a href="#">Access Control</a> to arrange for appropriate building/office access for new employee.</p> <ul style="list-style-type: none"> <li>• Keys</li> <li>• Keypad codes</li> <li>• Building access code</li> </ul>	Manager
<input type="checkbox"/>	<b>Employment paperwork and orientation</b>	<p>Work with department HR to schedule new employee for employment paperwork and orientation.</p> <ul style="list-style-type: none"> <li>• Contact new employee to schedule appointment for employment paperwork and orientation</li> </ul>	Manager
<input type="checkbox"/>	<b>Additional:</b>		
<input type="checkbox"/>	<b>Additional:</b>		
<input type="checkbox"/>	<b>Additional:</b>		
<input type="checkbox"/>	<b>Additional:</b>		



## 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"/>	<b>Departmental mission, vision, values and organization charts</b>	<ul style="list-style-type: none"> <li>Review department mission, vision, values, current departmental goals</li> <li>Review relevant organization charts</li> </ul>	Manager and Human Resources
<input type="checkbox"/>	<b>Office culture</b>	Review office culture with new employee: <ul style="list-style-type: none"> <li>Personal conduct, code of Conduct, confidentiality</li> <li>Phone etiquette</li> <li>Unit practices, etc.</li> <li>Staff meetings</li> </ul>	Manager
<input type="checkbox"/>	<b>Networking calendar</b>	Set up networking meetings for new employees to meet staff and campus partners. <i>(if applicable)</i>	Manager
<input type="checkbox"/>	<b>Job-specific duties</b>	Review job description and Physical, Environmental, and Mental Demands (PEM) form: <ul style="list-style-type: none"> <li>Have employee sign job description and PEM, and send original to FSHR.</li> </ul>	Manager
<input type="checkbox"/>	<b>Work procedures</b>	Describe relevant work procedures to new employee: <ul style="list-style-type: none"> <li>Work hours and schedule</li> <li>Procedure for notification for time off</li> <li>Steps to resolving problems and conflicts</li> </ul>	Manager
<input type="checkbox"/>	<b>Performance expectations and evaluation methods and the probationary period</b>	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

	TASK	INFORMATION AND RESOURCES	TASK LEADER
<input type="checkbox"/>	<b>ID card issued &amp; CalNet token obtained</b>	After the hiring notification e-mail is received by the supervisor, the new employee must visit <a href="https://cal1card.berkeley.edu/">https://cal1card.berkeley.edu/</a> to obtain a Cal ID.	Manager and employee
<input type="checkbox"/>	<b>Office supplies and machines</b>	Review use of phones, tablets, fax machines, copiers, and other relevant work tools.	Manager
<input type="checkbox"/>	<b>Tour</b>	Provide new employee with tour of workspace and relevant sites on campus.	Manager
<input type="checkbox"/>	<b>List serves</b>	Request to add employee to applicable internal list serves and shared drives with HR and FS . <ul style="list-style-type: none"> <li>• Contact AVC's assistant to add employee to FS listserve</li> <li>• Explain list serves to employee</li> </ul>	Manager
<input type="checkbox"/>	<b>Business Cards</b>	Assist new employee in selecting and ordering business cards (if applicable).	Manager
<input type="checkbox"/>	<b>UCB New Employee Orientation</b>	Assist employee to register for UC Berkeley New Employee Reception & Orientation ( <a href="https://hr.berkeley.edu/development/learning/new-employee-orientation">https://hr.berkeley.edu/development/learning/new-employee-orientation</a> ).	Manager
<input type="checkbox"/>	<b>WarnMe Emergency Alert System</b>	Have the new employee sign up at the WarnMe ( <a href="http://warnme.berkeley.edu">warnme.berkeley.edu</a> ) 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"/>	<b>Safety &amp; emergency</b>	Review safety and emergency preparedness: <ul style="list-style-type: none"> <li>• Review building evacuation plan (provide copy if applicable)</li> <li>• Describe role in business resumption (if applicable)</li> <li>• Review Injury and Illness Prevention Plan (IPP) (provide copy)</li> <li>• Review appropriate safety information</li> </ul>	Manager

	TASK	INFORMATION AND RESOURCES	TASK LEADER
<input type="checkbox"/>	<b>Staff meetings</b>	Add staff meetings to bCal or provide new staff member with a meeting calendar.	Manager
<input type="checkbox"/>	<b>Systems access and training</b>	Arrange for access and training to relevant tools and systems. Examples: (server folders, Maximo, bCal, UCPath, BearBuy, CalTime, etc.)	Manager
<input type="checkbox"/>	<b>General overview</b>	Review the following information with the new employee: <ul style="list-style-type: none"> <li>• <b><u>Facilities Services Mission</u></b></li> <li>• <b><u>Principles of Community</u></b></li> <li>• <b><u>Statement of Ethics</u></b></li> </ul>	Manager
<input type="checkbox"/>	<b>Policies overview</b>	Review important department and campus policies and procedures and web sites. Examples: <ul style="list-style-type: none"> <li>• Facilities Services Code of Conduct</li> <li>• Driving/vehicle policies</li> <li>• Sexual Harassment policy</li> <li>• Policy/Bargaining Agreement website (<i>if applicable</i>)</li> <li>• Drug and Alcohol policy</li> </ul>	Manager
<input type="checkbox"/>	<b>Access overview</b>	Explain relevant access needs and new employee tasks: <ul style="list-style-type: none"> <li>• Explain CalNet ID (<b>calnet.berkeley.edu</b>)</li> <li>• Explain Cal 1 Card (<b>schedule appointment to get card</b>)</li> <li>• Explain bCal (<b>bcal.berkeley.edu</b>)</li> <li>• Explain bMail (<b>bmail.berkeley.edu</b>)</li> <li>• Explain CalTime &amp; Time Clocks</li> </ul>	Manager
<input type="checkbox"/>	<b>Classification and performance</b>	Review relevant classification and performance with new employee: <ul style="list-style-type: none"> <li>• Provide blank performance evaluation or link to Achieve Together Probationary period end date: _____</li> </ul>	Manager

	TASK	INFORMATION AND RESOURCES	TASK LEADER
<input type="checkbox"/>	<b>Training and employee services</b>	Direct new employee to relevant training and employee services: <ul style="list-style-type: none"> <li>• UCB Learning Center</li> <li>• Sexual Harassment Prevention training (supervisors)</li> <li>• Ethics training</li> <li>• Career Place</li> <li>• Ombuds Office (<a href="http://staffombuds.berkeley.edu">staffombuds.berkeley.edu</a>)</li> <li>• People and Culture Employee and Labor Relations (<a href="http://hrweb.berkeley.edu/er">hrweb.berkeley.edu/er</a>)</li> <li>• CARE Services (<a href="http://uhs.berkeley.edu/facstaff/care">uhs.berkeley.edu/facstaff/care</a>)</li> <li>• Whistleblowers</li> <li>• Maximo</li> <li>• Safety Training</li> </ul>	Manager
<input type="checkbox"/>	<b>Campus amenities</b>	Provide information on campus amenities: <ul style="list-style-type: none"> <li>• Access to libraries, museums, performances, etc.</li> <li>• Recreational Sports Facility</li> <li>• Wellness programs</li> </ul>	Manager
<input type="checkbox"/>	<b>FS overview</b>	Review and refer employee to FS's support services and resources. Help employee with the following: <ul style="list-style-type: none"> <li>• Set up CalNet ID (<i>if applicable</i>)</li> <li>• Set up bMail</li> <li>• Set up bCal</li> <li>• Business System Accounts (<i>if applicable</i>)</li> <li>• Computer Security Training (<i>if applicable</i>)</li> <li>• FS Employee Resources Webpage</li> </ul>	Manager
<input type="checkbox"/>	<b>Ergonomics @Work</b>	Review and refer employee to the Ergonomics Program <ul style="list-style-type: none"> <li>• Business Ergonomic Evaluators conduct evaluation (<a href="http://uhs.berkeley.edu/facstaff/ergonomics">uhs.berkeley.edu/facstaff/ergonomics</a>)</li> </ul>	Manager
<input type="checkbox"/>	<b>Benefits reminder</b>	Remind employee to enroll in benefits. Eligible employees are sent a welcome email and benefits package within five days of hire. Employee has 31 days from date of hire to sign up for benefits. Note that some benefits are only available during the initial enrollment, e.g. Supplemental Disability Insurance.	Manager
<input type="checkbox"/>	<b>Additional:</b>		

# New Employee Checklist

# POST-ORIENTATION



## 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"/>	<b>Schedule three-month performance review</b>	Evaluate the employee's performance in accordance with applicable policies, procedures, and contracts. This should be done in writing using the appropriate form.	Manager and employee
<input type="checkbox"/>	<b>Schedule six month performance review</b>	Evaluate the employee's performance in accordance with applicable policies, procedures, and contracts.	Manager and employee
	<b>Create professional development plan</b>	Create a professional development plan.	Manager and employee
<input type="checkbox"/>	<b>Post orientation check in</b>	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"/>	<b>Additional</b>		

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

Employee Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Supervisor Signature: \_\_\_\_\_ Date: \_\_\_\_\_



