**NEW EMPLOYEE CHECKLIST**

**SECTION I: Preparing for Your New Employee’s Arrival - Before the 1st Day of Work**

**SUPERVISOR DUTIES**

Begin New Hire Process *New Hire Checklist*

Confirm acceptance of the job offer

Send an employment offer letter (this should include direction for the employee to schedule a meeting with Payroll prior to their start date to complete e-Verification requirements)

Email all staff of the new employee’s starting date

Plan for the first day

|  |  |  |
| --- | --- | --- |
|  |  |  |
| Employee Name *(as it appears on Social Security Card)* |  | Home Number |
|  |  |  |
| Address |  | Cell Number |
|  |  |  |
| Home Email Address |  | Employee Supervisor |
|  |  |  |
| Hire Date |  | Start Time |

|  |  |  |
| --- | --- | --- |
| Department |  | Job Title |

|  |  |  |
| --- | --- | --- |
| Grade |  | Job Code |

|  |  |  |
| --- | --- | --- |
| AccountCode |  | Salary |

|  |  |  |
| --- | --- | --- |
| Name as it should appear on business cards |  | Name as it should appear on name plate |

**HR PAYROLL DUTIES**

[Employment Eligibility Verification (Form I-9)](http://accounting.ucdavis.edu/Forms/PR_EmploymentEligibility.pdf), e-Verify

Forward employee information and EID # to Office Manager and Supervisor

**OFFICE MANAGER DUTIES**

**Logistic Arrangements:**

Space

Furniture

Name plate

Supplies and Equipment

Building and officeaccess: keys, keypad, ID card

**Miscellaneous:**

Order name badge with access

Order [business cards](http://reprographics.ucdavis.edu/stationery/businesscards/)

Add name to mail room slot

Update and print phone list

Prepare Employee Controlled Assets/Inventory for signature

[**Computer and computing access**](http://iet.ucdavis.edu/computing/)**:**

Hardware

Software

Networks

Shared folders

Distribution lists

Online time reporting system

Set up email account

Prepare Employee Controlled Assets/Inventory Form for employee signature

[**Telecommunications**](http://cr.ucdavis.edu/policies/proceduresdetail.cfm)**:**

Telephone services, if necessary long distance code

Mobile devices: cell phone and/or iPad

**| SECTION II: Welcoming Your New Employee – Their First Day on the Job |**

**SUPERVISOR DUTIES**

**Wages and Hours**

Hours of operation, [work schedules](http://manuals.ucdavis.edu/spp/ppsm31.pdf), rest periods, [workplace flexibility](http://www.hr.ucdavis.edu/worklife-wellness/work/workplace-flexibility)

[Timecard reporting](http://payroll.ucdavis.edu/), if necessary mileage reporting (proof of current auto insurance)

[Pay periods, paychecks](http://accounting.ucdavis.edu/Forms/index.cfm?opt=6)

**General**

Provide the employee with an office tour and make division and department introductions

Acquaint your new employee with your department and Salt Lake County

Cafeteria location & hours

Schedule of staff meetings or other standing activities

Division’s website, intranet, and e-Connect

Health Clinic

Caring for Kids - Day Care

Credit Union

Transit Passes & Van Pools

**Work Environment**

Assigned work area

Restrooms

HR break room & cleanup

Storage of resource materials, office supplies and order process

Recycling Bins

Office equipment

Mail/Courier room - delivery and pickup, proper addressing

Building access and security measures

Issuance of keys (building, office, desk, files, vehicle) or access card

Approved Parking Areas

Review vehicle use practices (private and fleet)

**Documents**

Job Description

Overtime Compensation Agreement (to be filed with payroll coordinator)

Conflict of Interest Form

Department and division organizational charts

Organization mission & vision statements

HR Professional Standards Document

HR Standard Operating Procedures

County’s core values statement

County-wide Policies

Special note of Countywide Policy 1400-1: IT Security Acceptable Use

HR Policy Manual / Binder

Special note of [HR Policy 3-300 Standards of Conduct](http://slco.org/uploadedFiles/depot/admin/fHR/policy/3-300_Standards_of_Conduct.pdf)

**Required Training** (to be completed within first two weeks of employment)

Employee was provided ample time to review County-wide and HR policies

In-Person Benefits Orientation

Online New Employee Orientation

Online Sexual Harassment Prevention & Ethics Training

Online Sexual Harassment Prevention Training (for Supervisors)

Online Defensive Driving Training (required only for recipients of mileage reimbursement – proof of current auto insurance must be provided for the employee file)

Assign an office “buddy” to help train and guide the new employee

**| SECTION III: The First Week – Getting off to a Good Start |**

**SUPERVISOR DUTIES**

[**Safety plans**](http://safetyservices.ucdavis.edu/quick-links/safetynets/safety-program-guidelines)

[Disaster Plans: evacuation](http://safetyservices.ucdavis.edu/programs-and-services/emergency-continuity-planning/emergency-plans-1/eap/emergency-action-evacuation-planning-eap) and lockdown procedures, employee kits

[Reporting a work-related injury or illness](http://safetyservices.ucdavis.edu/programs-and-services/risk-management/copy_of_workers-compensation/workers-compensation-injury-reporting/?searchterm=report%20work-related%20injury)

Review Calling Tree Exercise

**Performance Management**

[Probationary Period](http://www.hr.ucdavis.edu/supervisor/Er/copy_of_Probation) (schedule 3-month and 5-6 month reviews)

[Performance appraisal process](http://www.hr.ucdavis.edu/forms/Perf_Eval)

Provide organizational goals and individual goals

Provide Performance Plan & Appraisal Form

Provide list of key customers and partners

**| SECTION IV: Third Week – Review Employee Progress |**

**SUPERVISOR DUTIES**

**Required Training Date Completed**

[Benefits Orientation](http://www.hr.ucdavis.edu/sdps/neo/new-employee-orientation) (in-person) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[New Employee Orientation](http://www.hr.ucdavis.edu/sdps/neo/new-employee-orientation) (online) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Sexual Harassment Prevention & Ethics Training (online) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Sexual Harassment Prevention & Ethics Training for Supervisors (online) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Online Defensive Driving Training (for recipients of mileage reimbursement) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Proof of current auto insurance was placed in employee file \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**EMPLOYEE ACKNOWLEDGEMENT**

I acknowledge that I have been directed to read and understand HR policies. I understand that it is my responsibility to read and comply with all policies and any revisions made to them and that I should consult the Human Resources Division regarding any questions not answered in my review of the policies.

Since the information, policies, and benefits are necessarily subject to change, I acknowledge that revisions may occur.  All such changes will be communicated, and I understand that revised information will supersede, modify, or eliminate existing policies.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Employee Name (Printed)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Employee Signature Date

**| SECTION V: Three Monthly Probationary Review – Keeping on Track |**

**SUPERVISOR DUTIES**

Review Employee Performance Plan and status

Goal Setting

Assist employee with training or other needs

Discuss any areas of concern

**SECTION VI: Complete Probationary Appraisal |**

**SUPERVISOR DUTIES**

Probationary Appraisal Completed. (Per [HR Policy 6-100](https://slco.org/uploadedFiles/depot/admin/fHR/policy/6-100_Performance_Development_and_Improvement_Plans.pdf), if a probationary appraisal is not processed within six months of employment, the employee will automatically receive merit status.)