**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.)