

New Employee Checklist

_____ Employee Name	_____ Payroll Title
_____ Email	_____ Telephone Number
_____ Supervisor Name	_____ Hire Date

Section I—Preparing for Your New Employee’s Arrival: before the First Day

Communication

- Confirm acceptance of the job offer
- Consider sending an [appointment letter](#)
- Address applicable conditions of employment
 - [Background check](#)
 - [Employee driving records](#) (DMV Pull Notice System)
 - [Employment Eligibility Verification](#) (Form I-9)
 - [License requirements](#)
 - [Pre-placement medical examination](#)
- Acquaint your new employee with your department and UC Davis
- Provide critical first-day information

Work Environment—Location

- Space
- Furniture
- Name plate
- Supplies and Equipment
- Keys or access card

Computer and computing access

- Hardware
- Software
- Networks
- Shared folders
- Distribution lists
- Online time reporting system

Voice Communications

- Telephone services
- Mobile devices

Miscellaneous

- Name badge
- Business cards
- Protective clothing and equipment
- Uniforms
- Mailbox
- Phone lists, department directories, databases, organizational charts
- Welcome sign, potted plant, department mug

Collaboration

- Announcement
- Coordination with department and university staff that will be assisting with the process
 - Human Resources (business office, Shared Service Center, administrative cluster)
 - Information Technology
 - Facilities
- Buddy
- Schedules
 - Itinerary for first week
 - Benefits orientation
 - Appointments with key personnel

Department-Specific Items

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Section I completed

Employee (Signature) _____ **Date**
Supervisor (Signature) _____ **Date**

Copy to department personnel file

New Employee Checklist

Employee Name: [Click here to enter text.](#)

Section II—Welcoming Your New Employee: the First Day

Section III—Getting off to a Good Start: the First Week

Introductions

- Greet upon arrival
- Plan for the first day
- Department vision, mission and relationship to employee's job
- Department head
- Buddy
- Co-workers
- Lunch

Work Environment

- Tour
- Assigned work area
- Restrooms
- Storage of resource materials and supplies
- Common areas
- Office equipment
- Mail boxes
- Building access and security measures
- Issuance of keys (building, office, desk, files) or access card
- [Transportation and parking options](#)
- Time to set up work area
- [Office Ergonomics](#)
 - [Setting up your Computer Workstation Video](#)
 - [Computer Workstation Training and ergonomics awareness quiz](#)
 - Evaluation: Contact your [Departmental Safety Coordinator](#) for assistance.

Computing Access

- [Email account](#)
- [Email and internet protocol](#)
- [Acceptable Use Policy](#)
- [Computer and information security](#)
- Department's website and intranet
- Technical support

Policies, Procedures and Paperwork

New employee forms

- Background check
- California State Loyalty Oath—UPAY 585
- Child Abuse Notification
- Compensatory Time Off Agreement
- Elder Abuse Notification
- Employee driving records (DMV Pull Notice System)
- Employment Eligibility Verification (Form I-9)
- E-verify
- License requirements
- Near Relative Permission Request
- Pre-placement medical examination
- Physicians Designation
- Workers Compensation Injury/Incident Reporting

Position description (from the Library in the People Admin Position Management system)

- Position Reports: Position Description and Expectations Report to be signed and dated by employee, supervisor and department head
- Fair Labor Standards Act exemption status
- Relevant personnel policy manual (Academic Personnel Manual or Personnel Policies For Staff Members) or bargaining contract
- Fair Share fee or union dues

Wages and Hours

- Hours of operation, work schedules, rest periods, workplace flexibility
- Time reporting
- Absence from Work policy
- Salary, overtime, shift and weekend differential, incentive awards
- Pay periods, paychecks/Surepay
- Merit eligibility and cycles

Safety plans

- Emergency Action Plan (EAP)
- Emergency Contact Numbers:
911 or UC Davis Emergency Hotline: **752-4000**
- Emergency Preparedness
- Personal Safety
- Annual Security/Fire Safety Report (including fire safety and security policies and procedures)
- Preventive medicine and monitoring requirements
- Protective Clothing and Equipment

- Warn Me Emergency Notification Service
- Reporting a work-related injury or illness
- Location and use of fire extinguisher, fire-alarm box, emergency shower, and personal protective clothing/equipment; location of two means of emergency exit from work site
- Location of [Occupational Health Services](#), [Student Health and Wellness Center](#) and [Sutter Davis Hospital Emergency Room](#)

Administrative matters

- Calendar (e.g., academic and general campus, administrative holidays, standing meetings, special events)
- Employee ID/Aggie Card
- Online campus directory
- Office equipment use
- Copy card
- Telephone system and etiquette
- Staff list
- Campus and US mail
- Dress and personal appearance standards

University Policies

- Nondiscrimination and Affirmative Action Policy Regarding Academic and Staff Employment
- Sexual Harassment
- Substance Abuse
- Smoking
- Conflict of Interest
- Violence in the Workplace
- Violence Against Women Act
- Improper Governmental Activities/Whistleblower Protection

Orientation

- New Employee Orientation website
- New Employee Benefits orientation
- New Employee Welcome event
- New Employee Orientation e-course
- UC Davis FrontDoor website
- Principles of Community
- The Ripple Effect: Sexual Harassment Affects Us All
- UC Ethical Values and Conduct
- UC mission
- UC Davis mission
- UC Davis Strategic Vision
- Department and division organizational charts

- Overall campus structure
- Diversity Resources
- Schedule of staff meetings or other standing activities

Training and Development

- Educational fee assistance
- Environmental Health and Safety and Emergency Management
- Sexual Harassment Education Program
- Staff Development and Professional Services

Performance Management

- Customer base and discuss expectations for customer service
- Performance expectations and means of assessment
- Probationary Period
- Performance appraisal process

Department-Specific Items

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Section II and III completed

Employee (Signature) _____ **Date**
Supervisor (Signature) _____ **Date**

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New Employee Checklist

Employee Name:

Section IV—Learning the Routine: the First Month

Policies, Procedures and Paperwork

- Benefits enrollment completed before end of period of initial eligibility

Training and Development

- Review progress on training plan
- Introduce Individual Development Plan (IDP)
- Living the Principles of Community on-line course

Performance Management

- Assignments and timelines
- Instructions and resources
- Weekly reviews of goals and deliverables
- Increasing scope and complexity of work
- Contact Human Resources if there are any significant performance/behavior concerns

Department-Specific Items

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Section IV completed

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New Employee Checklist

Employee Name: Enter Name.

Section V—Mastering the Role: the First 6 Months

Training and Development

- SMART goals
- Variety of project types and learning opportunities
- Future projects and assignments per [Individual Development Plan \(IDP\)](#)
- Networking opportunities
- Department and [campus mission](#) revisited
- [Campus Community Relations' Diversity Education Program](#)

Performance Management

- Knowledge, skills, abilities and assignments to compliment or enhance strengths.
- Areas for growth and improvement
- Monthly reviews of [performance expectations](#) and deliverables
[Employee Development Worksheet](#)
- [Pay for Performance website](#)
- Probationary Period
- Probationary period report
- [Policy 61, Release](#)

Department-Specific Items

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Section V completed

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New Employee Checklist

Employee Name: Enter name.

Section VI—Encouraging Employee Engagement: the First Year

Training and Development

- Opportunities of interest
- Opportunities to directly enhance job performance
- Opportunities to interact with greater cross section of campus community
- “Fit” with department strategic plan
- Update Individual Development Plan (IDP)
- Training and development opportunities at UC Davis
- UC Systemwide training and development opportunities
- Educational fee assistance

Performance Management

- Performance expectations
- Core Competencies
- Behavioral Indicators
- Employee Performance Appraisals
- Summary of Accomplishments
- Employee Performance Appraisal Forms for represented employees
- Individual Development Plan (IDP)

Recognition

- Periodic acknowledgements, spot awards, department celebrations,
- Recognition and Incentive Award Plans
- Chancellor’s Achievement Awards
- Diversity and Principles of Community Achievement Awards
- Staff Assembly Citation for Excellence

Community Involvement

- Campus news and communications
- UC Davis Social Media
- Administrative Advisory Committees
- Campus Community Book Project
- Constituent Organizations and Community Interest Groups
- Culture Days

Department-Specific Items

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Section VI completed

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