New Employee Checklist

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Payroll Title</th>
</tr>
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<tbody>
<tr>
<td>Email</td>
<td>Telephone Number</td>
</tr>
<tr>
<td>Supervisor Name</td>
<td>Hire Date</td>
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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 Vision of Excellence
☐ 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

☐ Copies to employee and department personnel file
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

Employee (Signature) __________________________ Date
Supervisor (Signature) __________________________ Date

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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

Employee (Signature) ___________________________ Date
Supervisor (Signature) ___________________________ Date

☐ Copies to employee and department personnel file
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

Employee (Signature) __________________________ Date
Supervisor (Signature) ______________________ Date

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