



New Employee Orientation Checklist for Supervisors

Student Life & LHS

Employee's First and Last Name:	Supervisor:	Date:
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PRE-ORIENTATION CHECKLIST (complete 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"/>	Notify Human Resources of hire	Submit BIZeBEARS ticket to request to hire employee.	Manager
<input type="checkbox"/>	Notify new employee of job offer	Department HR will provide offer letter to new employee.	Manager/Human Resources
<input type="checkbox"/>	Welcome call or e-mail to new employee	Contact new employee prior to reporting to work: <ul style="list-style-type: none"> • Serve as main point-of-contact for information, issues, or concerns • Information regarding site location including directions, dress, and accommodations • Instruction about what to expect for first day and department's orientation • Links to relevant web sites 	Manager
<input type="checkbox"/>	New employee training	Complete orientation schedule and identify needed outside and/or departmental training for new employee. Examples: <ul style="list-style-type: none"> • BIZeBEARS • BearBuy • Blu Card/Event Card 	Manager
<input type="checkbox"/>	Alert functional groups of new hire	Send an announcement of new hire to all relevant internal groups and campus partners.	Manager



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	TASK	INFORMATION AND RESOURCES	TASK LEADER
	Alert functional groups of new hire <i>(continued)</i>	Sample e-mail: Dear Colleagues, It is my pleasure to welcome (NAME) to (program/unit) as (work- ing title). (Name) joins us following (indicate relevant previous experience). Please join me in welcoming (name) to the Berke- ley community. He/she can be reached at (e-mail) and (phone number). Sincerely, Manager	
<input type="checkbox"/>	Welcome banner or card	In functional group, create and sign welcome banner or card for new employee.	Manager
<input type="checkbox"/>	Peer mentor/coach/buddy selection	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.	Manager selects peer mentor from functional team if requested by new employee.
<input type="checkbox"/>	Parking and transportation	If needed, help new employee coordinate parking and transportation until they can get a CalNet ID and campus permit.	Manager
<input type="checkbox"/>	Computer setup and software	Coordinate with Student Affairs IT at SAITservice@berkeley.edu for new employee to have appropriate computer setup, hard- ware, software and network.	Manager & SAIT
<input type="checkbox"/>	Workspace preparation and supplies	Coordinate with unit's Business Services at campuslife.berke- ley.edu/busops to ensure new employee is well prepared on their first day by preparing their workspace: <ul style="list-style-type: none"> • Workspace is clean and supplies are stocked • Name badges and name plates <i>(if applicable)</i> • Uniforms <i>(if applicable)</i> • Department mailbox 	Manager & Business Services



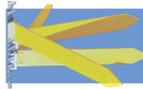
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	TASK	INFORMATION AND RESOURCES	TASK LEADER
<input type="checkbox"/>	Building access	Coordinate with unit’s Business Services at campuslife.berkeley.edu/busops to arrange for appropriate building/office access for new employee. <ul style="list-style-type: none"> • Keys • Keypad codes • Building access code 	Manager & Business Services
<input type="checkbox"/>	Additional:		

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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 employee.

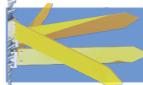
	TASK	INFORMATION AND RESOURCES	TASK LEADER
<input type="checkbox"/>	Schedule three-month performance review	Evaluate the employee's performance in accordance with applicable policies, procedures and contracts. This should be done in writing.	Manager
<input type="checkbox"/>	Schedule six-month performance review	Evaluate the employee's performance in accordance with applicable policies, procedures and contracts.	Manager
<input type="checkbox"/>	New Employee Institute <i>(pending)</i>	Check with HR if employee attended the mandatory New Employee Institute and include in six-month performance review.	Manager
<input type="checkbox"/>	Create professional development plan	Create professional development plan.	Manager
<input type="checkbox"/>	Additional:		
<input type="checkbox"/>	Additional:		



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ORIENTATION CHECKLIST (complete within one week of hire date)

Use this checklist as a guide to orient your new employee to your department and the University. Please provide employee with a copy so that they can write their comments and notes.

	TASK	INFORMATION AND RESOURCES	EMPLOYEE SIGNATURE
<input type="checkbox"/>	Departmental mission, vision, values and organization charts	Review relevant and important department and campus policies and procedures and demonstrate staff web site.	
<input type="checkbox"/>	Office culture	Review office culture with new employee: <ul style="list-style-type: none"> • Personal appearance • Personal conduct, code of ethics/behavior, confidentiality • Phone etiquette • Unit practices, etc. • Staff meetings 	
<input type="checkbox"/>	Networking calendar	Set up networking meetings for new employee to meet staff and campus partners. <i>(if applicable)</i>	
<input type="checkbox"/>	Job Description and PEM	Review job description and Physical Environmental Mental Demands (PEM) form. Have employee sign job description and PEM and put original in personnel file along with application.	
<input type="checkbox"/>	Performance expectations and evaluation methods and the probationary period	Along with a clear job description and PEM, provide the employee with clear performance expectations and objectives so that the employee understands what is expected and how he/she will be measured. Discuss the probationary period.	



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	TASK	INFORMATION AND RESOURCES	EMPLOYEE SIGNATURE
<input type="checkbox"/>	Job-specific duties	Manager or mentor teaches position-specific duties.	
<input type="checkbox"/>	Work procedures	Describe relevant work procedures with new employee: <ul style="list-style-type: none"> • Work hours and schedule • Procedure for notification for time off • Steps to resolving problems and conflicts 	
<input type="checkbox"/>	ID card issued & CalNet token obtained	<p>After the HRMS hiring notification e-mail is received by the supervisor, the new employee must bring their employee ID number and photo identification (i.e. current driver’s license, state ID, passport, etc) to the Cal 1 Card office to obtain CalNet token.</p> <p>The Cal 1 Card Office is open from 9-5, M-F, at 180 Cesar Chavez Center, Lower Sproul Plaza. Please visit Cal 1 Card website for additional information: services.housing.berkeley.edu/c1c/static/index.htm</p>	
<input type="checkbox"/>	Office supplies and machines	Review use of phones, fax machines, copiers and other work supplies.	
<input type="checkbox"/>	Tour	Provide new employee with tour of workplace and relevant sites on campus.	
<input type="checkbox"/>	Business Cards	Assist new employee in selecting and ordering business cards, if applicable. UCSF Campus Life Services is the designated printer of campus business cards. Please visit the Office of Business and Marketing Outreach web site for instructions at: ombo.berkeley.edu/news/printing-services-business-cards-letterhead-and-other-campus-needs	



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	TASK	INFORMATION AND RESOURCES	EMPLOYEE SIGNATURE
<input type="checkbox"/>	List serves	Request to add employee to applicable internal list serves and shared drives with HR and SAIT. Explain list serves to employee.	
<input type="checkbox"/>	UCB New Employee Orientation	Register new employee through UC Learning Center at: hrweb.berkeley.edu/toolkits/new-employees/orientation For information about New Employee Orientation sessions or if you encounter problems during the registration process, please contact the CoRWE Logistics Coordinator at: corwe@berkeley.edu	
<input type="checkbox"/>	WarnMe emergency alert service	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. WarnMe can alert you by phone, text message or e-mail — you choose the best way to reach you. Have new employee sign up at: warnme.berkeley.edu	
<input type="checkbox"/>	Safety and emergency	Review department’s safety and emergency procedures.	
<input type="checkbox"/>	Staff meetings	Add staff meetings to bCal or provide new employee with a meeting calendar.	



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	TASK	INFORMATION AND RESOURCES	EMPLOYEE SIGNATURE
<input type="checkbox"/>	Systems access and trainings	Arrange for access and training to relevant tools and systems: <ul style="list-style-type: none"> • BFS/BAIRS • BearBuy • BIZeBEARS • CARS • bSpace (if applicable) • HCM/OPTRS 	
<input type="checkbox"/>	Probationary period	<p>Discuss probationary period.</p> <p>Explain that the employee will be evaluated in writing at three and six months during the probationary period.</p> <p>The probationary period should be used to ensure that the new employee is qualified to perform the job and achieve regular status. During this period, managers should carefully evaluate the employee's performance and general suitability for employment. To make this decision, managers should develop performance expectations and objectives, observe the employees, provide feedback, and set aside ample time to evaluate the employee's performance.</p>	
<input type="checkbox"/>	Additional:		
<input type="checkbox"/>	Additional:		

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

Employee signature: _____ Date: _____

Supervisor signature: _____ Date: _____

