Division of Business & Finance Orientation Checklist

Employee Information	
Name:	Start Date:
Position:	Supervisor:
Department:	

FIRST DAY
☐ Provide employee with Employee Handbook and Business & Finance User Guide.
☐ Conduct a tour of the department and give introductions to staff and key personnel.
☐ Conduct a tour of the employee's work location including restrooms, kitchen, copier/fax machine, mail room, supplies, emergency exits, etc.
☐ Name of Mentor Assigned:

FIRST WEEK
☐ Ensure issuance of ID, Access Cards and Parking Pass.
☐ Ensure employee already has a scheduled date/time (within first three days) to meet with Human Resources to sign important documents and enroll in benefits.
☐ Ensure employee is scheduled for luncheon with Vice President.
☐ Explain the organization and the functions and services of the department as they relate to the University of West Georgia's mission statement.
☐ Explain the B&F Division's mission, duties, responsibilities, the work of the department, and the organizational chart.
☐ Review the job description and provide a copy to the employee in order to familiarize him/her with the responsibilities of the position.
☐ Discuss the performance evaluation program and the frequency of reviews.
☐ Explain work hours, shift start and end time, lunch, overtime procedure (if applicable) and the importance of correctly recording and approving hours in ADP

TRAINING

☐ Ensure employee is scheduled for required new employee compliance training with the Center for Business Excellence. This includes:

• Ethics	• Right to Know
• Risk Management	• Vehicle Risk & Safety (including Cart safety)

Date of Training:

Ensure employee is trained on the systems below:		
Systems/Equipment	*Yes*	*Not Required*
1. ADP	☐	☐
2. PeopleSoft	☐	☐
3. Fleet Vehicle Fuel Card Usage	☐	☐
4. Job Specific Training	☐	☐
Review of Hardware & Software	*Yes*	*Not Required*
1. Email	☐	☐
2. Microsoft Office	☐	☐
3. Data on Shared Drive(s)	☐	☐
4. Databases	☐	☐
5. Intranet/Internet	☐	☐

POLICIES	
☐ Review the key policies and procedures below:	
• Method of reporting absences and tardiness	• Holidays
• Scheduling time off	• Confidentiality
• Inclement weather practices	• Performance & Conduct
• Departmental dress code	• Sexual Harassment
• E-mail, use of internet, and use of computer protocol	• Safety
• Telephone and cell phone use	• Emergency procedures
• Visitors	• Recycling program

ADMINISTRATIVE PROCEDURES		
☐ Review all general administrative procedures below:		
• Office/desk/workstation	• Keys	• Building access cards
• Conference Rooms	• Office Supplies	• Shipping (FedEX, UPS, etc.)
• Mail (incoming & outgoing)	• Telephones	• Purchase requests
• Business cards	• Expense Reports	• Picture ID badges

OTHER
Please list any other applicable items you discussed with your new employee:

Employee Signature:_____ **Date:** _____

Supervisor Signature:_____ **Date:**_____

Please give a copy of this to the employee, and return this completed form to Christy Rabern in Row Hall no later than 30 days from the employees start date.