

NEW EMPLOYEE CHECKLIST

ADDITIONS & COMMENTS WELCOME

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FOR: _____

DATE OF HIRE: _____

SUPERVISOR/MANAGER _____

PAYROLL/PERSONNEL ANALYST _____

Welcome to UCSF. We believe that Orientation is a process, not just an event. Our intent is to have the new employee:

- ? Feel at ease and welcome at UCSF.
- ? Obtain a good grasp of UCSF's organizational history, mission and values.
- ? Understand the functions of different units, divisions and departments.
- ? Understand what the organization expects in terms of work and behavior.
- ? Know everything necessary to start performing his/her job.
- ? Know who and where to go to for help with work matters.
- ? Know the policies and procedures of UCSF and of the new employee's department.
- ? Feel a part of the UC family.

This checklist details many of the activities that need to take place in the new employee's first six months with UCSF.

? Designates who is responsible for performing the task, the new employee ("EE") or another departmental staff member ("DEPT"). If the Supervisor/Manager will be delegating this task, indicate to whom the task has been delegated.

| BEFORE THE NEW EMPLOYEE'S FIRST DAY | | Responsibility | | |
|--|---|----------------|------|--------------------------|
| Task | Resources | EE | DEPT | Done |
| Send offer/welcome letter. | Sample Letter (coming soon) Tip: I include a copy of the job description with the letter. | | ? | <input type="checkbox"/> |
| Notify unit personnel/payroll/benefits representative of hire. | | | ? | <input type="checkbox"/> |
| Prepare new employee packet, including: ? Agenda for the first week ? UCSF Mission and Principles of Community Statements (included in campus new employee orientation) ? UCSF Organizational Chart (included in campus new employee orientation) ? UCSF Code of Conduct (included in new employee orientation) ? Departmental Organizational Chart ? Departmental mission, vision, and values ? Departmental phone/e-mail directory ? Buddy Program Information ? Emergency Procedures | http://www.ucsf.edu/about_ucsf/history_philosophy/mission.html (UCSF Mission and Principles of Community Statements) http://chancellor.ucsf.edu/orgchart.pdf (UCSF Organizational Chart) http://ucsfhr.ucsf.edu/policies/finalcc.pdf (UCSF Campus Code of Conduct) Buddy Program information (Coming Soon) | | ? | <input type="checkbox"/> |
| Notify departmental information technology (IT) contact of hire. Provide list of required software/hardware. Request email setup. | | | ? | <input type="checkbox"/> |
| Notify departmental telecommunications contact of hire. Request phone hookup and voicemail setup. | | | ? | <input type="checkbox"/> |
| Prepare employee work area, including: ? Ordering any needed desk supplies & furniture ? Ordering a nameplate ? Assigning keys and keypad codes | | | ? | <input type="checkbox"/> |

| BEFORE THE NEW EMPLOYEE'S FIRST DAY (Continued) | | Responsibility | | |
|--|--|----------------|------|--------------------------|
| Task | Resources | EE | DEPT | Done |
| Make lunch plans for employee's first day. | | | ? | <input type="checkbox"/> |
| I identify UCSF employee who will be the new employee's buddy; Give buddy his/her buddy packet. | Buddy Program information (coming soon) | | ? | <input type="checkbox"/> |
| I identify employee(s) with similar responsibilities to function as the new employee's coach/mentor for work-related processes & procedures. | | | ? | <input type="checkbox"/> |
| Add employee to department and/or unit organizational contact and routing lists. | | | ? | <input type="checkbox"/> |
| Prepare new hire paperwork (payroll & benefits information). | New Hire Paperwork Checklist (coming soon) | | ? | <input type="checkbox"/> |
| Prepare parking permit information/paperwork (if applicable). | | | ? | <input type="checkbox"/> |
| Set up timesheet(s). | | | ? | <input type="checkbox"/> |
| Install appropriate hardware/software. | | | ? | <input type="checkbox"/> |
| Establish e-mail. | | | ? | <input type="checkbox"/> |
| Complete phone and voice mail set-up. | | | ? | <input type="checkbox"/> |


| ON THE NEW EMPLOYEE'S FIRST DAY | | Responsibility | | |
|---|--|----------------|------|--------------------------|
| Task | Resources | EE | DEPT | Done? |
| Send welcome e-mail to staff announcing the new employee's arrival, function and location. | Warm welcome ideas: ? Welcome signs/banner at desk ? Coffee/donuts or bagels staff get together ? Flowers | | ? | <input type="checkbox"/> |
| Introduce employee to co-workers and buddy; give brief tour of department. | | | ? | <input type="checkbox"/> |
| Meet with personnel/payroll/benefits representative to complete new hire paperwork and to receive introduction to employee benefits. | | ? | ? | <input type="checkbox"/> |
| Complete fingerprint process (if applicable). | | ? | ? | <input type="checkbox"/> |
| Obtain UCSF employee I.D. | | ? | ? | <input type="checkbox"/> |
| Schedule attendance at orientation programs: 1) Campus New Employee Orientation Program 2) Benefits Orientation | Note: Advance sign-up is required for the Campus New Employee Orientation Program. | ? | ? | <input type="checkbox"/> |
| Order business cards. | | ? | ? | <input type="checkbox"/> |
| Introduce employee to work area, including: ? Ergonomic Review - (Arrange for/make any needed adjustments.) ? Use of phones ? Departmental purchasing policies ? Computer orientation - common programs & useful websites ? Review & set up standard meetings. | Ergosmart diskette available from Departmental Benefit Representative or Disability Management Services. | ? | ? | <input type="checkbox"/> |

| ON THE NEW EMPLOYEE'S FIRST DAY (Continued) | | Responsibility | | |
|--|-----------|----------------|------|--------------------------|
| Task | Resources | EE | DEPT | Done? |
| Orient employee to worksite: ? Coffee room ? Bathrooms ? Photocopy machines ? Fax machines ? Supplies ? Restaurants ? Transportation ? Break rooms ? ATM's ? Vending machines ? Location of first aid and emergency supplies ? Mail services | | ? | ? | <input type="checkbox"/> |

| WITHIN THE FIRST MONTH | | Responsibility | | |
|--|---|----------------|------|--------------------------|
| Task | Resources | EE | DEPT | Done? |
| Review departmental new employee packet, including: <ul style="list-style-type: none"> ? UCSF Mission and Principles of Community Statements (also included in new -employee orientation) ? UCSF Code of Conduct (also included in new -employee orientation) ? UCSF Organizational Chart (also included in new -employee orientation) ? Departmental Organizational Chart/Problem Resolution Channels ? Departmental mission, vision, and values and the connection to UCSF's mission and values ? Departmental phone/e-mail directory ? Buddy Program Information ? Emergency Procedures | http://www.ucsf.edu/about_ucsf/history_philosophy/mission.html (UCSF Mission and Principles of Community Statements) http://chancellor.ucsf.edu/orgchart.pdf (UCSF Organizational Chart) http://ucsfhr.ucsf.edu/policies/finalcc.pdf (UCSF Campus Code of Conduct) Buddy Program (Coming Soon) | ? | ? | <input type="checkbox"/> |
| Review departmental policies and procedures re: <ul style="list-style-type: none"> ? Probationary period ? Timesheets ? Vacation and sick leave accrual and use ? Dress Code ? Hours of Work ? Work Rules ? Attendance Policy ? Phone etiquette ? Personal phone usage policy ? Personal computer usage policy ? Performance appraisal process ? Merit/salary increase timeline | | ? | ? | <input type="checkbox"/> |

| WITHIN THE FIRST MONTH (Continued) | | Responsibility | | |
|--|---|----------------|------|--------------------------|
| Task | Resources | EE | DEPT | Done? |
| Introduce employee to job: ? Review Job Description. ? Discuss supervisor's style and expectations. ? Review performance goals and expectations. ? Identify the "players" connected to the position; make appointments with "key players." ? Identify the "customers" served by this position; define customer service. ? Discuss employee safety. ? Review standard meetings the employee needs to attend. | | ? | ? | <input type="checkbox"/> |
| Identify what training and development activities will be needed in the next six months. Sign up for the appropriate classes. | http://ucsfhr.ucsf.edu/training/index.html (Development & Training Website) | ? | ? | <input type="checkbox"/> |
| Meet weekly to complete orientation to work-related tasks and to ask/answer questions. | | ? | ? | <input type="checkbox"/> |
| Set performance expectations and discuss how and when the employee will be evaluated. Provide feedback on a weekly basis. | | ? | ? | <input type="checkbox"/> |
| Meet with key players. | | ? | ? | <input type="checkbox"/> |
| Meet Department Head and/or Chair. | | ? | ? | <input type="checkbox"/> |

| WITHIN FIRST SIX MONTHS ON THE JOB | | Responsibility | | |
|---|---|----------------|------|--------------------------|
| Task | Resources | EE | DEPT | Done |
| Provide monthly feedback to the employee regarding his/her job performance, including a formal performance evaluation in the third month. | See the appropriate bargaining agreement or personnel policy for specific evaluation language. http://ucsfhr.ucsf.edu/pubs/forms/hrforms.html | | ? | <input type="checkbox"/> |

| AFTER SIX MONTHS ON THE JOB | | Responsibility | | |
|---|---|----------------|------|--------------------------|
| Task | Resources | EE | DEPT | Done |
| Prepare formal six-month employee evaluation. | http://ucsfhr.ucsf.edu/pubs/forms/hrforms.html | | ? | <input type="checkbox"/> |
| Celebrate completion of probationary period! |  | ? | ? | <input type="checkbox"/> |

This checklist was designed by New Employee Committee members Carol Broderick, Joanne Fraysse, Glee Tuttle, and Linda Watkins.