



SERVICE TEAM CHECKLIST FOR NEW EMPLOYEES (On-Boarding)

ROLES & RESPONSIBILITIES

HR PARTNER

	Complete Recruitment in RMS (when applicable).
	Create Daily Note in CruzTime to tickler probationary period evaluation due date and end date on your calendar and the supervisor's calendar. Be sure to set access to confidential.
	Do PAN review (use <i>Job Offer Report</i> in RMS or ER for LNRs).
	Prepare and send <i>Supervisor Checklist for New Employees</i> to supervisor (after receipt of Live Scan appointment date and completion of PAN review).
	Update SHR List Serves and databases as appropriate (these are currently being identified and/or developed).

SERVICE TEAM REPRESENTATIVE

Schedule On-Boarding appointment in CruzTime

New Hires/Rehires: Appointment will immediately follow the Employment Sign Up. Use the CruzTime Calendar to schedule On-Boarding appointment with employee, and to set a reminder (Daily Note) for the supervisor. Set access to confidential.

All Other Actions: Call employee to set up appointment (new appointment paperwork from Employment is needed before On-Boarding can be scheduled). Use the CruzTime Calendar to schedule On-Boarding appointment with employee, and to set a reminder (thumbtack tool) for the supervisor. Set access to confidential.

Prepare On-Boarding Packet:

	<i>Information for New Staff Employees</i> handout http://shr.ucsc.edu/forms/forms/shr-1950.pdf
	Services Provided/On-Boarding Resources for Employees & Supervisors (screen shot) Point out the following areas of interest: campus policies, helpful web pages, Benefits, and Training and Development. http://shr.ucsc.edu/hrst/services/on-boarding/index.htm
	Monthly Working Hours http://shr.ucsc.edu/topics/comp-class/misc/monthly-work-hours.pdf
	Pay Dates Calendar http://financial.ucsc.edu/SiteCollectionDocuments/Calendar_Year_Pay_Dates_2008.pdf
	Live Scan paperwork (if applicable) http://shr.ucsc.edu/shr-procedures/section-c/c19_livescanguide.pdf
	Compensatory Time Off (CTO) Election form (CX, TX, RX, SX, HX, K7, FF)
	Create time record (follow team process). Determine if employee will participate in CruzPay.
	Union Contract (if applicable)
	Benefits Packet (if applicable)
	<i>Supervisor's Basic Roles and Responsibilities</i> (for new supervisors) To determine if the <i>Supervisor's Basic Roles and Responsibilities</i> handout should be provided to the employee, check the EREL code on the Job Offer Report. EREL codes A - D = statutory supervisor - provide handout EREL codes E - F = non-statutory supervisor - check job description to determine if employee is a non-statutory supervisor (supervises one person). If yes, provide the handout. http://shr.ucsc.edu/hrst/info/supervisor-roles-resp.pdf

Meet With Employee: Review <i>Information For New Staff Employees</i> handout	
	Helpful web pages. Provide screen shot of On-Boarding Resources for Employees & Supervisors.
	Pay periods and when to expect first paycheck. For MO (monthly) employees: their paycheck will be the same amount each month regardless of the number of working hours in the month. Provide Pay Dates Calendar.
	Vacation—accrual, maximum, waiting period (RX, TX, SX, K-7)
	Sick Leave—accrual, usage
	Holidays— Provide <i>Monthly Working Hours Chart</i>
	Non-Exempt: working overtime, pre-approval required, provide CTO Election form (CX, TX, RX, SX, HX, K7, FF), 6 consecutive day policy (CX and TX), usage/pay, other types of leave, record time worked and leave taken to the nearest quarter hour
	Non-Exempt Part Time: additional pay vs. overtime, consequences of working less than 50%—especially during probationary period and months with holidays
	Exempt: Record leave taken in full day increments. Their schedule will dictate the amount of hours to claim (e.g., 5.00, 6.25, 8.00).
	Shift Differential
	Work week/schedule—Explain vac/sick/holiday and how to fill out time record. All non-standard workweek and work schedules require approval from supervisor and notice to the Service Team.
	Leaves of Absence—A written request is required for any leave over 5 days, except <u>paid</u> vacation leave.
	CAREER EMPLOYEES: Probationary period, performance appraisals salary review dates and types, job description
	For New Supervisors —Review <i>Supervisor's Basic Roles and Responsibilities</i> handout.

Provide:	
	Overtime Election Form (if offered by Division)
	Monthly Working Hours chart
	Paper time record and/or information regarding how and where to report time worked and leave taken (CruzPay, Portal, etc.)
	Union Contract (if applicable)
	Benefits Packet (if applicable)

Signature Required:	
	Live Scan (<i>if applicable</i>)—have them sign forms and set up appointment with Mail Services.
	For "All Other Actions"—employee signs <i>Job Offer Report</i> , application, DCD, and BELI (<i>if applicable</i>).

Final Steps:	
	Ensure first month pay has been processed (OPTRS or TRW).
	For "All Other Actions", return signed paperwork to Employment in a red folder to be filed in existing personnel file.
	Inform HRP of Live Scan appointment time.