

## New Employee Onboarding Checklist for Supervisors

This checklist provides clear guidance for the onboarding of an employee throughout their first year and is a companion to our [Supervisor onboarding toolkit](#) web pages. Supervisors are expected to navigate these progressive milestones with their employees.

Read before starting this checklist: Some action items (e.g. name plate, supplies, equipment, mailbox, etc) in the pre-hire up through the first month *might* be completed by your local divisional contact (such as an office manager, facilities coordinator or administrative support person). To avoid duplication of efforts, please check with your local contact to find out if they are handling any of these items. Ask your manager if you aren't sure who your local contact is.

Employee Name	Phone	E-mail	Start Date
Employee ID	Position Number	Employee Title	
Supervisor Name	Unit/Dept. Name	Worksite Location	

### Section 1. Preparing for Your New Employee's Arrival: Before the First Day

If you have questions about a specific item, first ask your manager for clarification. You can also contact the campus unit that oversees the specific function/process/procedure.

Note: Ensure employee attends their First Day Onboarding Session to complete appropriate paperwork. This should occur **before** the employee reports to their work location.

#### Communication

- Confirm acceptance of the formal job offer with Talent Acquisition
- Address conditions of employment (as applicable)
- Acquaint your new employee with your department/campus and provide critical first-day information (e.g. onboarding, parking, where to go, what to bring, schedule, etc.). For more information, check the [Supervisor Onboarding Toolkit](#).

#### Work Environment

##### Location & Setup (as applicable)

- Prepare space and furniture
- Prepare a name plate
- Gather basic supplies and equipment
- Order keys or access card
- Order name badge and business cards
- Order uniforms, protective clothing, and equipment
- Label mailbox
- Update phone lists, department directories, databases, organizational charts
- Prepare a welcome sign, welcome packet, and other department items (e.g. potted plant, department mug, etc.)

#### Computer Setup & IT Services

##### Prepare Workstation:

- Submit an IT Request ([itrequest.ucsc.edu](http://itrequest.ucsc.edu)) ticket if need be (or to the ticketing system used in your unit if you happen to be in SOE or SocSci)

**Section 1. Preparing for Your New Employee's Arrival: Before the First Day**

- If purchasing a new computer, [purchase information](#) can be found on-line. Consult with your division/department to see if they have a different procedure for computer purchases
- New office: Your facilities coordinator can [request a network jack and telephone to be installed](#)
- Telephone services: Have your facilities coordinator request a name change on the existing telephone or order a new phone if necessary
- If applicable, arrange for mobile devices (e.g. cell phone, pager, radio)
- [Review Records Access Notice](#)

**Getting Connected**

- Send an email announcement about your new hire
- Review work schedules
- Itinerary for the first week
- Establish meetings with key personnel

**Department-Specific Items**

- Check your Div/Dept Specific Checklist for required action items

**Section 1 Completed**

**Signature** (Supervisor) \_\_\_\_\_

**Date** \_\_\_\_\_

**Section 2. Getting Off to a Good Start: The First Week**

Read before starting this checklist: Some action items in the pre-hire up through the first month might be completed by your local divisional contact (e.g. name plate, supplies, equipment, mailbox, etc). To avoid duplication of efforts, please check with your local contact to find out if they are handling any of these items. If you have questions about a specific item, first ask your manager for clarification. You can also contact the campus unit that oversees the specific function/process/procedure.

**Introductions**

- Plan for first day
- Greet upon arrival
- Explain and discuss Department vision, mission, and relationship to employee's job
- Introduce new employee to Department head and teammates
- Propose to have lunch with new employee and teammates

**Work Environment**

Tour of:

- Assigned work area
- Restrooms - include all-gender list for reference
- Storage or resource materials and supplies
- Common areas
- Office equipment
- Mail boxes

**Section 2. Getting Off to a Good Start: The First Week**

- Building access and security measures
- Tour Environmental Health & Safety's [Injury and Illness Prevention Program](#) website and review the program [Departmental Plan](#)
- Issue of keys (building, office, desk, files) or access card/ID badge
- Explain transportation tips and parking options
- Explain office equipment use
- Issue copy card or arrange for copying/printing access
- Explain [telephone system and etiquette](#)
- Provide staff list
- Allow for time to set up work area utilizing the ergo self assessment guide
- Office ergonomics: To sign up for the training and self assessment, go to [UCSC online ergonomics training](#)

**Requesting and Using IT Services**

- [No action required / Informational] E-mail account: CruzID with e-mail access is delivered 3-5 days after entry into payroll system
- Active Directory account (if appropriate): submit an IT Request ticket [[Active Directory account request page](#)]
- Discuss email, calendar and internet protocol as appropriate
- [Google training classes](#)
- [Acceptable Use Policy](#), [Access to Information](#), and [Records Access Notice](#) as appropriate
- [Computer and information security](#)
- Department's website and intranet
- [Technical support](#)

**Policies, Procedures and Paperwork****Wages and Time Reporting**

- Discuss hours of operation, work schedules, rest periods, workplace flexibility
- Explain how to report time and request time off
- Explain Absence from Work policy
- Discuss salary, overtime, shift and weekend differential, incentive awards
- Explain pay periods and paychecks
- Explain merit eligibility and cycles

**Administrative Items**

- Provide Calendars (e.g. academic and general campus, administrative holidays, standing meetings, special events)
- Provide schedule of staff meetings and other team events (such as retreats)
- Obtain emergency contact information for your file
- Share information about staff appreciation events (such as picnic, holiday gathering)
- Explain mail services: Campus and US mail
- Mandatory: Update campus directory ([see "how-to" guide here](#))



### Section 2. Getting Off to a Good Start: The First Week

- Discuss dress and personal appearance standards
- Instruct employee to sign up for Cruz Alert
- Discuss telecommuting agreement (if applicable)
- Discuss remote access (if applicable)
- Discuss scent-free office (if applicable)

#### **Safety Plans**

- Review [campus safety and wellness information](#)
- Discuss emergency procedures

#### **University Policies**

- Nondiscrimination and Affirmative Action Policy Regarding Academic and Staff Employment
- Sexual Harassment Prevention
- Substance Abuse
- Smoking
- Conflict of Interest
- Violence in the Workplace
- Improper Governmental Activities/Whistleblower Protection

#### **Campus-Related Information**

- Provide information about New Employee Benefits Orientation
- Discuss Principles of Community
- Discuss UC Ethical Values and Conduct
- Discuss UC & Campus Mission/Vision
- Show how to access other Department and division organizational charts
- Discuss overall campus structure
- Explain what Diversity Resources are available

#### **Learning and Development**

- Educational fee assistance
- Environmental Health and Safety and Emergency Management
- Sexual Harassment Education Program
- Staff Development and Professional Services
- Share information about Learning Center website and how to access trainings for development
- Promote Diversity and Inclusion Certificate

#### **Performance Management**

- Review job description and expectations
- Performance expectations and feedback

**Section 2. Getting Off to a Good Start: The First Week**

- Who are your customers/clients? Discuss expectations for service levels and providing customer service
- Probationary Period (if applicable)
- Performance appraisal process

**Department-Specific Items**

- Check your Div/Dept Specific Checklist for required action items

**Section 2 Completed**

**Signature** (Employee) \_\_\_\_\_ **Date** \_\_\_\_\_

**Signature** (Supervisor) \_\_\_\_\_ **Date** \_\_\_\_\_

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**Section 3. Learning the Routine: The First Month**

If you have questions about a specific item, first ask your manager for clarification. You can also contact the campus unit that oversees the the specific function/process/procedure.

**Outstanding To-Do's**

- Make sure benefits enrollment and other paperwork has been completed within required open period
- Encourage new employee to check the [campus online directory](#) to make sure their name and contact information is correct
- Encourage new employee to check first paycheck information to ensure it reflects benefit plan choices, payroll deductions and personal information correctly

**Learning and Development**

- Review progress on training plan
- Introduce/Review development plan

**Performance Management**

- Schedule 1:1 weekly or biweekly touch bases with your new employee
- Discuss assignments and timelines
- Provide instructions and resources
- Discuss goals and deliverables
- Discuss increasing scope and complexity of work
- Contact your Employee Relations Analyst if there are any significant performance/behavior concerns
- Suggest your employee keep track of duties and accomplishments for their annual self-appraisal

**Section 3 Completed**

**Signature** (Employee) \_\_\_\_\_ **Date** \_\_\_\_\_

**Signature** (Supervisor) \_\_\_\_\_ **Date** \_\_\_\_\_

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**Section 4. Mastering the Role: The First Six Months**

If you have questions about a specific item, first ask your manager for clarification. You can also contact the campus unit that oversees the the specific function/process/procedure.

**Learning and Development**

- Determine which [learning and development courses](#) and programs your new employee should enroll in for the next six months (e.g. SHR L&D, UC Learning Center, other outside courses, professional organizations, etc.)
- Establish SMART goals
- Exposure to a variety of project types and different learning opportunities
- Promote networking opportunities
- Revisit department, division and [campus](#) mission statements

**Performance Management**

- Identify strengths and opportunities for growth and development
- Periodic review of performance expectations and deliverables
- Review [probationary period guidelines](#) and procedures
- Schedule conduct probationary appraisal meeting (at approx. 6 months)

**Department-Specific Items**

- Check your Div/Dept Specific Checklist for required action items

**Section 4 Completed**

**Signature** (Employee) \_\_\_\_\_ **Date** \_\_\_\_\_

**Signature** (Supervisor) \_\_\_\_\_ **Date** \_\_\_\_\_

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**Section 5. Employee Engagement: The First Year**

If you have questions about a specific item, first ask your manager for clarification. You can also contact the campus unit that oversees the the specific function/process/procedure.

**Learning and Development**

- Identify mutually agreed-upon opportunities to directly enhance job satisfaction and performance
- Promote opportunities to interact with greater cross section of campus community
- Discuss which opportunities may be appropriate and how they fit into the strategic plan for the department
- Talk about professional development options offered through UCSC ([Learning and Development](#))

**Performance Management**

- Understand performance expectations
- Review [UC Core Competencies](#)
- Review performance appraisal and engagement process
- Summary of Accomplishments



**Section 5. Employee Engagement: The First Year**

**Recognition**

- Explore available recognition programs and awards

**Campus Community Involvement**

- Encourage your new employee to explore the wide array of opportunities for involvement in the interests, initiatives and activities of the greater campus community
  - [Staff Advisory Board](#)
  - Circulate [campus news](#) and communications
  - [Administrative Advisory Committees](#)
  - [UC Santa Cruz Friends Groups](#)
  - [Giving Day](#)
  - [Campus Cleanup Day](#)

**Department-Specific Items**

- Check your Div/Dept Specific Checklist for required action items

**Section 5 Completed**

**Signature** (Employee) \_\_\_\_\_

**Date** \_\_\_\_\_

**Signature** (Supervisor) \_\_\_\_\_

**Date** \_\_\_\_\_

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