

Supervisor Checklist For New Employees

This document is being provided to the supervisor and/or designee to assist in the orientation process of a new employee.

EMPLOYEE APPOINTMENT INFORMATION				
Employee:		Start Date:		End Date:
Unit:		Supervisor:		Classification:
Working Title:		Personnel Program/Bargaining Unit:		Grade: Step: Open Range:
Pay Rate:		Actual Pay Rate: (proportionate to percent time)		Percent Time of Appointment:
FACTOR LEAVE ACCURALS (proportionate to percent time)		Ergonomics Review Due Date (if applicable):		Furlough if applicable:
Sick Leave:	Vacation Leave:	TBD		N/A
				Months on Furlough:
				N/A
FLSA Status - Check One:		Pay Cycle:		Furlough Dates:
EXEMPT <input checked="" type="checkbox"/> NON-EXEMPT <input type="checkbox"/>				N/A
Probation Period End Date:		Probation Period Review Due Date:		Next Salary Review Date:
				PER POLICY
FOR CRITICAL POSITIONS ONLY				
LIVESCAN APPOINTMENT SCHEDULE		Date:		Time:
		TBD		TBD
<i>NOTE: Mail Services will charge the Unit a service fee for "no shows" and appointments cancelled less than 24 hours prior to established date and time.</i>				

To be completed by ELR Analyst

WELCOME YOUR EMPLOYEE TO THE UNIVERSITY AND TO YOUR DEPARTMENT

Orientation is a process, not just an event. Plan ahead for positive results when welcoming your new employee to your department and UCSC. Whether the employee is brand new to campus or already has UC experience, orientation is a valuable process. Orientation helps your employee to feel a part of UCSC, to understand the functions of the unit, what you expect in terms of work and behavior, and how to perform his/her job.

During the sign up process, the Employment Department provides an informational handout that includes general appointment information, policies, and helpful websites. Information and handouts can be found on the Staff HR website.

http://shr.ucsc.edu/forms/onboarding_forms.html

Please contact your Employee Relations Analyst if you have any questions regarding this handout or the other information provided to the employee.

http://shr.ucsc.edu/contact/locate_team.html

REQUIRED ACTIONS:		<input checked="" type="checkbox"/>
CERTIFICATION DOCUMENTS	Ensure copies of appropriate documents, as required by the position and if appropriate, were obtained prior to employment: licenses, certificates, degrees, DMV Pull Notice, DMV Records Review, Post-Offer drug test and physical exam, Proof of Negative TB test.	

SAFETY AND INJURY MANAGEMENT PROGRAM INFORMATION	Give employee Injury Illness and Prevention Program (IIPP) Employee Orientation Document to read and sign. Send signed form to your department or divisional IIPP Coordinator. http://ehs.ucsc.edu/programs/IIPP/documents/iipp-employee-orientation.pdf	
REQUIRED TRAINING AND ERGONOMICS	TX/RX/SX - Training is required within 30 days for anyone working with hazardous materials. CX—Training is required within 15 days for anyone working with hazardous materials and a review of employee's work station for those who work more than 60% of their normal schedule at a video display terminal within 90 days. You can call 9-1448 to schedule an ergonomic review appointment. It is recommended that all staff have their work station evaluated. Environmental Health & Safety's training matrix provides guidance for supervisors to identify employee training requirements (e.g., Injury and Illness Prevention Program (IIPP) class or Laboratory Safety for Professionals/IIPP course). http://ehs.ucsc.edu/programs/IIPP/documents/iipp-training-matrix.pdf	
COMPUTER	Have employee fill out ITS account forms as appropriate to initiate all UCSC computer system accounts (i.e., E-mail, AIS, FIS, PPS, InfoView, FMW, Business Objects, CruzTime). For more information visit: http://its.ucsc.edu/	

REQUIRED ACTIONS <i>continued</i>		<input checked="" type="checkbox"/>
ALARMS/KEYS CODES/CARDS	Provide access to: building, office, lab, etc. Provide: keys, punch code, security pass, copy card, Procard, etc. (as applicable)	
SIGNATURE AUTHORIZATION	Give Signature Authorization form (if applicable) http://finaff.ucsc.edu/resources/pdf/ap/sigauth.pdf	
WORK RULES	Give employee a copy of written work rules (if applicable).	
TELEPHONE	Review voice mail and special phone procedures.	
WORK SCHEDULE	Discuss work schedule: percent time, work hours, work schedule/shifts, attendance, lunch and breaks. Submit the schedule in writing to your Operations Specialist in Staff Human Resources. You can locate your Operations Specialist at: http://shr.ucsc.edu/contact/locate_team.html .	
DEPARTMENT LISTS	Update organization charts and phone/e-mail lists and provide to employee.	

TOPICS FOR DISCUSSION:

CAMPUS STRUCTURE		<input checked="" type="checkbox"/>
CAMPUS RESOURCES	Supervisor, Staff HR, Office for Diversity, Equity, and Inclusion (EEO/AA) Office, Title IX/Sexual Harassment Officer, Campus Conflict Resolution, Employee Assistance Program (EAP)	
CAMPUS	Relationship of your department within context of organizational structure, goals, mission to UCSC (unit/department, division, and vice chancellor)	
UNIT STRUCTURE		<input checked="" type="checkbox"/>
UNIT	Unit's structure, organization chart, how employee's job fits into structure, unit priorities, budget, affiliated department office contact, e-mail list serves, phone/voice mail, campus directory listing	
OFFICE CULTURE	Personal appearance, personal conduct, code of ethics/behavior, confidentiality, staff meetings, social events, etc.	
USE OF EQUIPMENT	Personal and professional use of computer, e-mail, fax, copier (copy card), phone, etc.	
MISCELLANEOUS INFORMATION	Order supplies and business cards, travel and reimbursement procedures, sending and receiving mail, who to contact for computer support, recycling/shredding	
FACILITIES	Tour of building, facilities, restrooms, eating areas, restaurants, coffee carts, etc.	
TIME AND ATTENDANCE		<input checked="" type="checkbox"/>
LEAVE REQUESTS	How to request time off: vacation, sick leave, compensatory time, other leaves	
OVERTIME	Working overtime, pre-approval required, overtime election on file (CX, TX, RX, SX, HX, K7)	

TIMESHEET	CruzPay Time and Attendance System – how and when to submit your timesheet: https://financial.ucsc.edu/Pages/Launch_CruzPay.aspx	
PERFORMANCE MANAGEMENT (SEE SUPERVISOR'S ROLES AND RESPONSIBILITIES FOR ADDITIONAL INFORMATION)		<input checked="" type="checkbox"/>
JOB STANDARDS	Review job description. Articulate expectations and how performance will be measured. Review job description. Discuss when responsibilities will be assigned and how much training may be necessary or available in order to succeed in the responsibilities.	
PROBATIONARY PERIOD	Review when probation is scheduled to end and when to expect probationary performance evaluation.	
PERFORMANCE EVALUATION	Review: job duties, priorities, performance evaluation form, meetings to discuss progress.	
TRAINING	Internal training: how much and when formal training and development classes: See personnel policy/bargaining contract for number of hours release time allowed. Please note: It is the supervisor's responsibility to track the number of training hours for each employee.	

SAFETY/SECURITY ISSUES		<input checked="" type="checkbox"/>
RULES & GUIDELINES	It is the responsibility of every employee to promote a safe and healthful working environment. Environmental Health & Safety's web site contains information on health, safety and environmental principles and services including training.	
WORKER'S COMPENSATION	How to report on-the-job injury. Encourage good work station ergonomics. http://risk.ucsc.edu/workerscomp/index.html	
BUILDING EVACUATION PLAN	Disaster Preparedness Plan and emergency exit procedures; who to contact if campus or work site is closed.	
EMERGENCY CONTACT INFO	Obtain employee contact information in the event of an emergency.	
ON-CAMPUS TRAINING		<input checked="" type="checkbox"/>
TRAINING & DEVELOPMENT	Benefits Orientation held on the 1st and 3rd Thursday of each Month (except holidays and campus-closure dates). Information is available at: http://shr.ucsc.edu/benefits/workshops/orientation.html	
	New Employee Orientation and Campus Tour	
	UCSC offers professional and technical trainings. See Training and Development's web page for a list of classes: http://shr.ucsc.edu/training	

ADDITIONAL INFORMATION FOR NEW SUPERVISORS		<input checked="" type="checkbox"/>
SUPERVISOR STANDARDS	Your management philosophy for a new supervisor. Review Supervisor's Basic Roles and Responsibilities with employee.	
REQUIRED TRAINING CLASSES	Fair Hiring Training: Learn campus best practices to ensure fairness and excellence in all stages of the recruitment process. Hiring managers and search committee chairs must complete this training before conducting a recruitment and must renew their training every three years. http://diversity.ucsc.edu/training/fair_hiring_training.html	
	Title IX/Sexual Harassment: Effective January 1, 2005 (per Assembly Bill 1825), supervisors and faculty are required to have two hours of sexual harassment prevention training every two years. You can register for On-Line training at http://learningcenter.ucsc.edu/ . Information relating to the UC Santa Cruz Policy on Sexual Harassment and Sexual Violence is available at: http://hdpiu.ucsc.edu	
RECOMMENDED CLASSES/ CAMPUS TRAINING	Performance Management, Management Development Program, Leadership and Management Development classes, Diversity & Inclusion workshops. See Training and Development's web page for a list of classes: http://shr.ucsc.edu/training	