

# New Hire Checklist

Employee Name: \_\_\_\_\_ Date of Hire: \_\_\_\_\_

## Prior to First Day

- Department (or HR, if position was recruited through OACIS) orders a complimentary parking permit for employee's first day on campus or directs employee to Transportation & Parking Services (<http://www.tps.ucsb.edu>) prior to reporting on the first day to get a daily permit. The employee will need to complete the hiring paperwork before s/he can apply for a long-term permit.
- Advise employee to bring document(s) that establish identity and employment eligibility - <http://oiss.sa.ucsb.edu/departments/i-9-form-instructions>
- If the employee is relocating and needs advice on finding housing, direct him/her to Community Housing Office - <http://www.housing.ucsb.edu/cho-general-info.htm>

## First Day

- Complete all hiring documents:
  - I-9 Documentation - <http://oiss.sa.ucsb.edu/departments/i-9-form-instructions>
  - Oath/Patent - <http://www.bfs.ucsb.edu/general-accounting/updated-2011-patent-acknowledgment>
  - W-4/DE-4 - <http://www.bfs.ucsb.edu/sites/www.bfs.ucsb.edu/files/forms/ucw4-de4.pdf>
  - Direct Deposit Form - <http://accounting.ucsb.edu/Forms/view.cfm?form=payroll-payroll-and-non-payroll-deposit>
  - Invitation to Self-Identify Race, Ethnicity and Veteran Status Form (U5605) - <http://ucnet.universityofcalifornia.edu/forms/pdf/u-5605.pdf>

- Voluntary Self Identification of Disability Form (Form CC305) - [http://www.hr.ucsb.edu/sites/www.hr.ucsb.edu/files/forms/Vol\\_Self-ID\\_Disability\\_form.pdf](http://www.hr.ucsb.edu/sites/www.hr.ucsb.edu/files/forms/Vol_Self-ID_Disability_form.pdf)
- Provide employee with Job Description. Review the job description and have employee sign the job description.
- If applicable to your department, give the employee a Compensatory Time Election Form (non-exempt) - <http://www.hr.ucsb.edu/compensation/forms>
- Review department requirements/expectations for time reporting, working hours, lunch and break schedule
- Explain department procedures for requesting vacation, calling in for illness/absences,
- Provide or explain payroll schedule (biweekly or monthly)
- Explain how to enroll in direct deposit, apply for corporate card, if applicable to the employee's position.

## First Week

- Review probationary period status (typically 6 months) and performance expectations.
- Explain department expectations for personal use of phones, computers and email.
- Provide overview of University holidays, vacation and sick accrual rates, paid and unpaid leave policies or applicable collective bargaining articles.
- Explain any applicable safety requirements/health & safety practices and expectations and how to report a workplace injury or illness; have employee complete required online general safety training – <http://ehs.ucsb.edu/training/srr.html>
- Explain department emergency procedures and what to do in the event of a fire alarm/building evacuation.
- Provide keys/access cards and overview of department security practices.

- Schedule employee to attend the next New Employee Orientation  
<http://www.hr.ucsb.edu/training/new-employee-orientation>
- Show employee University web site and how to find campus resources, including Human Resources, Business & Financial Services, etc.
- Direct employee to information and resources available on the HR web page- New Employees – <http://www.hr.ucsb.edu/new-employees>
- Make an appointment for employees to have a Live Scan (be fingerprinted) if a background check is required for the position.  
<http://www.hr.ucsb.edu/employment/background-checks/criminal-convictions>
- Go over your department's training/orientation plan for employee's assigned duties and functions.

## First Month

- Overview of department organization, reporting structure, goals and mission, specific functions of section/unit where employee works.
- Training on proper operation and appropriate use of University equipment and resources, how to request /order supplies and equipment.
- Review University policies on equal opportunity, sexual harassment, email and computer usage (electronic communications policy), and other policies relevant to your department.
- Review training and development resources, career development opportunities.
- Schedule ergonomic evaluation (encouraged for employees working primarily in office/computer-based positions, required for clerical employees working over 60% with computer-based positions)