

Orientation Checklist for Supervisors

Orientation is not a one-day event. Rather, it is an on-going process. Asking open-ended questions of your new employee is a way to ensure that you receive feedback about what is going well and what is not going well during the orientation process. Consider asking these questions:

- Are there things that others or I could do that would assist you in learning your new position?
- Are there any areas of the job that require additional clarification?
- Is this position consistent with your expectations?
- Do you have the resources you need to perform your job effectively?

Contact your HR representative well before the end of the 3-month provisional period, if performance is not satisfactory.

Pre-Employment

- ☐ Coordinate publicity
- ☐ Plan welcoming activity
- ☐ Coordinate workspace
- ☐ Order supplies (business cards, name plate, etc.)
- ☐ Request e-mail account
- ☐ Arrange voice mail access
- ☐ Prepare first day job assignment
- ☐ Obtain relocation information

During the first three months of employment, the new employee's hiring supervisor and/or designated representative should cover the following items:

First Day Welcome

- ☐ Introduction to work group
- ☐ Tour of department
- ☐ Present initial job assignment
- ☐ Invite to lunch
- ☐ End of day recap meeting with supervisor

Introduction to the Organization

- ☐ History
- ☐ Culture
- ☐ Mission, values and philosophy
- ☐ Strategic plans, goals and objectives
- ☐ Literature/Video
- ☐ Tour of building
- ☐ Staff directory
- ☐ Role of HR Representative
- ☐ Introduction/identification of key staff people

Introduction to the Department

- ☐ Purpose
- ☐ Relation to other departments
- ☐ Organization of department
- ☐ Department's strategic plan
- ☐ Department standards
- ☐ Department committees
- ☐ Procedures
- ☐ Security access, rules and keys
- ☐ Supplies
- ☐ Calendars/schedules
- ☐ Standard meetings
- ☐ Web site/internet resources
- ☐ Introduction to mentor, coach or buddy

Introduction to the Position

- ☐ Equipment
- ☐ Phone number
- ☐ Copier
- ☐ Mail
- ☐ Fax machine
- ☐ Position description form
- ☐ Performance expectations/goals
- ☐ Safety/emergency procedures
- ☐ Work hours, breaks, mealtimes and other rules

Training

- ☐ Computer system
- ☐ E-mail
- ☐ Voice mail
- ☐ Software applications
- ☐ Telephone system
- ☐ Department specific training
- ☐ Learning & Development/Computing Services courses

General

- ☐ Attendance Expectations
- ☐ Illness reporting procedures
- ☐ PTO request practices
- ☐ Smoking policy
- ☐ Payroll timing, policies and procedures
- ☐ Parking
- ☐ ID card
- ☐ Credit card
- ☐ Expense reporting
- ☐ Bulletin boards and newsletters

New Employee Paperwork

- ☐ W-4 and state tax forms
- ☐ I-9
- ☐ Copy of employee handbook
- ☐ Health, Life & Disability insurance enrollment forms

Benefits and Compensation

- ☐ Health, life disability insurance
- ☐ Retirement benefits
- ☐ Employee Assistance Program
- ☐ Educational assistance
- ☐ Credit union
- ☐ Employee Assistance Program
- ☐ Child Care
- ☐ Facilities available for employee use
- ☐ PTO, holidays and unpaid leave
- ☐ Salary Increase/Performance Review Process

Key Company Policies

- ☐ Provisional period
- ☐ Employee handbook
- ☐ Intellectual Property
- ☐ Workplace Violence
- ☐ Policy on Deadly Weapons
- ☐ Confidentiality
- ☐ Progressive Discipline
- ☐ Performance Management
- ☐ Conflict of Interest
- ☐ Safety Training/Accident Procedures
- ☐ Use of equipment for personal use
- ☐ Sexual Harassment (include Computer-Based Training)