



**Departmental Orientation Checklist
Suggestions for the New Employee Orientation Process**

Employee's Full Name: _____

Department: _____ Supervisor: _____

Orientation Coordinator: _____ Date of Hire: _____

1. Prior to Starting Work

- _____ Send offer letter and personalized welcome, including link to Benefits paperwork
- _____ Confirm start date and work hours
- _____ Discuss dress code and other pertinent office standards.
- _____ Send parking regulations and map
- _____ Send campus map and building directory, highlighting employee's location
- _____ Provide location and time/date of New Employee Orientation.
- _____ If appropriate in your department, select a "buddy" and notify new employee
- _____ Prepare employee's workspace, office equipment, supplies, manuals, etc.
- _____ Prepare for department's one-on-one, unit-specific orientation with new hire

2. First Day

- _____ New Employee Orientation/Benefits sign-up, Payroll paperwork, Brief overview, (first Monday of employment)
- _____ Supervisor greets new employee and introduces him/her to office staff
- _____ Notification of next campus-wide New Employee Orientation (held 2 times / semester) attendance is expected
- _____ Tour of the department/building, including restrooms, break room, safety features (fire extinguisher, emergency exits, stairs, etc.)
- _____ Obtain emergency contact numbers from employee
- _____ Review payroll dates and overtime policy
- _____ Paperwork for any keys, card swipes, etc.
- _____ Vandal Card
- _____ Parking permit
- _____ Computer account(s)
- _____ Review phone usage, directories, etc.
- _____ Review computer log-in, usage, computer use policies and laws, etc.
- _____ Lunch and break hours explained

3. First Week

- _____ Provide an overview of all pertinent laws, as well as U of I policies, procedures, organization chart, reporting relationships, Strategic Plan, etc. – The New Employee Orientation Page on the HRD website will help in this review.
- _____ Review job description (ROJD) and specific departmental expectations/standards

- _____ Review individual's task assignments
- _____ Check on employee's supplies and work environment
- _____ Continue general orientation to work unit
- _____ Introduce employee to key contacts and other colleagues
- _____ Review time entry procedures and timekeeping policies
- _____ Discuss annual leave and sick time accrual, hours for medical appointments, etc.
- _____ Discuss holiday scheduling
- _____ Discuss educational opportunities, including tuition waiver/reimbursement
- _____ Discuss UI procedures in case of emergency, disaster, or security issues

4. First Month:

- _____ Develop Performance Development Plan (PDP) for first 6-month (probationary) period. For assistance, contact Deborah Manning, Performance Management and Organizational Development Specialist, at dmanning@uidaho.edu or 208-885-9161.
- _____ Task assignment and review meeting* (i.e., conduct at least monthly 1-on-1 meetings to review progress, assess training needs, offer coaching, and receive employee feedback and questions)
- _____ Provide recognition of progress to date; offer suggestions; receive feedback
- _____ Provide employee with a copy of the safety video "24/7" and record date viewed
- _____ Schedule any Banner training required for position

5. First Quarter:

- _____ Task assignment and review meetings* (see above)
- _____ Provide recognition of progress to date; offer suggestions; receive feedback
- _____ Modify PDP as needed to help ensure success
- _____ Schedule and conduct meeting for 3-month performance evaluation
- _____ Schedule professional development/skill enhancement training if needed

6. First Six Months:

- _____ Task assignment and review meetings* (see above)
- _____ Conduct Performance Evaluation for Probationary status no later than the end of the designated 6-month probationary period, and carry out needed follow-up
- _____ Provide recognition of progress to date; offer suggestions; receive feedback
- _____ Assess/discuss need for modifications
- _____ Schedule professional development/skill enhancement training if needed

7. First Year

- _____ Employee completes self-review, which supervisor reviews
- _____ Complete employee's Annual Performance Evaluation
- _____ Meet and discuss Performance Evaluation (Annual)
- _____ Provide recognition of progress to date; offer suggestions; receive feedback
- _____ Send congratulatory note on one-year anniversary
- _____ Discuss any training, cross-training, or development opportunities

* While tasks will be in ROJD, the supervisor may want to assign tasks incrementally to help ensure employee success.