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 direct 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-9forminstructions.aspx

☐ If the employee is relocating and needs advice on finding housing, direct him/her to Community Housing Office - http://www.housing.ucsb.edu/hchoices/cho-general-info.htm

First Day

☐ Complete all hiring documents:


  ▪ Direct Deposit - http://www.bfs.ucsb.edu/payroll/employees

  ▪ Demographic Data Form - http://www.oeosh.ucsb.edu/EOAA/DDTForm.html

☐ 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 and other time reporting procedures.

Provide or explain payroll schedule (biweekly or monthly)

Explain how to 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 home page 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 employee 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)