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:

- I-9 Documentation - http://oiss.sa.ucsb.edu/departments/i-9forminstructions.aspx

- Oath/Patent - http://www.bfs.ucsb.edu/sites/www.bfs.ucsb.edu/files/forms/UPAY_585_11_11_Patent_Acknowlegment.pdf

- W-4/DE-4 - http://www.bfs.ucsb.edu/sites/www.bfs.ucsb.edu/files/forms/ucw4-de4.pdf

- 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)