

New Employee Onboarding Checklist

Berkeley Social Welfare

Employee's First Name and Last Name:	Supervisor:	Date:*
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Use this checklist as a guide to help you successfully prepare for your new employee prior to their start date so that they can have a memorable welcoming!

TASK	INFORMATION AND RESOURCES	TASK LEADER	TIMELINE
Employee supplies, office, access	<ul style="list-style-type: none"> ● Keys ● After Hours building access ● Printer copy code ● Printer access (CSS/IT/Lorretta Morales) ● Supplies (office/ desk) 	Building Manager	
Employment paperwork and orientation	<ul style="list-style-type: none"> ● HR Rep issues CalNet token ● Schedule new employee for employment paperwork and orientation ● Benefits training ● Onboarding ● For background check: IOC paperwork 	HR Rep	Prior to and during employee's first day
Campus amenities	<p>Provide information on campus amenities:</p> <ul style="list-style-type: none"> ● Access to libraries, museums, performances, etc. <ul style="list-style-type: none"> – http://www.lib.berkeley.edu/doemoff/pubaccess.html ● Recreational Sports Facility <ul style="list-style-type: none"> – http://recsports.berkeley.edu/facilities/rec-centers/recreational-sports-facility-rsf/ ● Wellness programs <ul style="list-style-type: none"> – http://hrweb.berkeley.edu/benefits/plans/wellness 	UC Websites	

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Obtain Cal ID Card and Parking & Transportation permit	<p>The new employee must bring their employee ID number and photo identification (i.e. current driver's license, state ID, passport, etc.) to the Cal 1 Card (services.housing.berkeley.edu/c1c/static/index.htm) office to obtain a Cal ID and/or CalNet token. The Cal 1 Card Office is open from 9-5, M-F, at 212 Sproul Hall.</p> <p>Employee can then go to the Parking & Transportation office to sign up for parking permits or transportation passes. Review commuter benefits (Wage Works)</p> <ul style="list-style-type: none"> • https://www.wageworks.com/ 	New Employee	Pick up Cal ID on first day
Job-specific duties	<p>HR Rep sends new employee job description and Physical, Environmental, and Mental Demands (PEM) form for review and signature:</p> <ul style="list-style-type: none"> • Have employee sign job description and PEM, and return to HR Rep. 	New Employee, HR Rep, Manager	Prior to and during employee's first day
New employee training	<p>See manager</p>	Manager, New Employee	Within 1-2 weeks
Networking calendar	<p>Set up networking meetings for new employee to meet staff and campus partners (see manager)</p>	Manager	Within 1 month
Departmental mission, vision, values and organization charts	<p>Review department mission, vision, values</p> <ul style="list-style-type: none"> • Review current departmental goals <p>Review relevant organization charts Attach organization chart Contact list/ phone directory - (Front Desk) Office map (Front Desk)</p>	Manager	1-2 weeks

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	Work procedures	Review relevant work procedures with manager <ul style="list-style-type: none"> • Work hours and schedule • Procedure for notification for time off/sick leave Steps to resolving problems and conflicts <ul style="list-style-type: none"> • CalTime 	Manager/ New Employee	Within 1 week
	Performance expectations and evaluation methods and the probationary period	Along with a clear job description, provide the employee with clear performance expectations and objectives so the employee understands what is expected and how he/she will be measured. Discuss the probationary period (manager places a calendar request for 6 month).	Manager, Employee	Within 1-2 weeks
	Tour of Space and Office Machinery	Provide new employee with tour of workspace and relevant sites on campus and use of office machinery	Manager	1st day
	List serves/ Drives	Request to add employee to applicable internal list serves and shared drives <ul style="list-style-type: none"> • Explain list serves to employee • Explain CSS ticketing system 	Manager, CAO	1st day
	Business Cards	Assist new employee in selecting and ordering business cards.	Manager, Lorretta Morales	Within 1-2 weeks
	UCB New Employee Orientation	Assist employee to register for UC Berkeley New Employee Orientation through the UC Learning Center (hrweb.berkeley.edu/toolkits/new-employees/orientation).	Manager/ HR Rep	Within 3 months
	WarnMe Emergency Alert System/Go bag	Have the new employee sign up at the WarnMe (warnme.berkeley.edu) web site. WarnMe is UC Berkeley's alerting and warning service for students, staff, and faculty. It is activated to contact you when there is an immediate threat to safety or health affecting the campus community. Provision a "go bag" for new employee	Manager	1st day

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	Safety & emergency	Review safety and emergency preparedness: <ul style="list-style-type: none"> Review building evacuation plan (provide copy if applicable)—Lorretta Describe role in business resumption (if applicable) Review Injury and Illness Prevention Plan (IPP) (provide copy) Review appropriate safety information 	Building Manager	Within 1-2 weeks
	Systems access and training	Arrange for access and training to relevant tools and systems. Examples: (Active Directory, bCal, etc.)	Manager	Prior to 1st day
	General overview	Review the following information with the new employee: <ul style="list-style-type: none"> Student Affairs Mission (students.berkeley.edu/uga/gnr/general/mission.htm) Principles of Community (berkeley.edu/about/principles.shtml) Statement of Ethics (ucop.edu/ucophome/coordrev/policy/Stmt_Std_Ethics.pdf)	Manager	Within 1-2 weeks
	Policies overview	Review important department and campus policies and procedures and web sites. Examples: <ul style="list-style-type: none"> Family Educational Rights and Privacy Act (FERPA) Sexual Harassment policy (training?) Policy/Bargaining Agreement website (<i>if applicable</i>) (atyourservice.ucop.edu/employees/policies_employee_labor_relations/collective_bargaining_agreements.html) (http://ucnet.universityofcalifornia.edu/labor/bargaining-units/) Drug and Alcohol policy (police.berkeley.edu/rules/alcohol_drug_laws_and_policies.html) Whistleblower Policy 	Manager	Within 1-2 weeks

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Overview of employee services	Direct new employee to relevant training and employee services: <ul style="list-style-type: none"> • UCB Learning Center/ Blu • Sign up for campus New Employee Orientation • Sexual Harassment Prevention training • Ethics training • Career Place • Ombuds Office (staffombuds.berkeley.edu) • OHR Employee Relations (hrweb.berkeley.edu/er) • CARE Services (uhs.berkeley.edu/facstaff/care) • Whistleblowers 	Manager, HR Rep	Prior to and during 1st day
Ergonomic review	HR Rep emails Lorretta to schedule evaluation until new employee	Lorretta Morales	1st day
Create professional development plan	Discuss with manager about a professional development plan.	Manager, Employee	Within 6 months

I have reviewed and successfully completed all information in this checklist.

Employee Signature: _____

Manager Signature: _____

updated on April 7, 2015