Orientation Checklist

Orientation Checklist
Before the New Employee Arrives

Notify everyone in your unit that a new person is starting and what the person’s job will be

Ask the other staff members to welcome the new employee and encourage their support

Identify a staff member to act as an orientation partner for the first week

Enroll the employee in New Employee Orientation

Set up an e-mail account, phone and voice mail (if hiring documents are complete)

Send the new employee:

- A welcome letter
- Parking information
- Schedule for the first week
- Brief information about the department
- The Tucson Book of Lists, Chamber of Commerce materials and information about relocation services if employee is relocating (Above & Beyond Relocation Services)
- A position description
- The phone number within his/her workspace
- The employee benefits web site address

Call the employee to discuss:

- How pleased you are that he/she will be joining you
- Whether the employee has a special request for office supplies or a calendar
- Any concerns that he/she might have

Clear your calendar, your new employee needs access to you during the first week

Set up the employee’s workstation (computer, phone, office supplies)

Plan a meaningful work assignment for the first week

During the First Day

Create a comfortable environment and remember not to overwhelm the employee

Arrive before the new employee

Give a warm welcome and discuss the plan for the first day

Hold a welcome reception

Tour the employee’s assigned work space

Explain where rest rooms, refreshments, and break areas are located

Complete required hiring documents (if needed)
Provide required keys

Arrange to have lunch with the new employee

Tour the building and immediate area and introduce the new employee to other staff members

Introduce the new employee to the **orientation partner** (if appropriate)

Review the department's (or office's) organizational chart and explain its relationship to campus

Review your office's policies and procedures including:
- Working hours, breaks, sick and annual leave
- Reporting injuries
- Pay dates and compensatory time
- Telephone, e-mail, and Internet use
- Office organization (files, supplies, etc.)
- Office resources (directories, protocol manuals, computer program manuals)
- Staff meetings
- Customer service philosophy (phone call response time, etc.)
- Confidentiality

**During the First Week**

Ensure needed equipment is in place

Review the week’s activities

Request feedback from the assigned orientation partner

Set up a brief meeting with the employee and the orientation partner to review the first week’s activities

After-hours and weekend office access

Review with the employee:
- Travel and reimbursement policies and procedures
- Purchasing policies and procedures
- Employment search policies (if employee has hiring responsibilities)
- Campus mail services
- Office supplies use and ordering
- Copy machine and fax use
- Office safety issues
- How to use the University’s web site to find resources
- Software piracy issues
- File servers
- Time reporting

**During the First - Six Months**

**Within the First Month**

Meet with employee to review:
- Position description
- Performance standards
Work rules
His/her concerns
Send employee to New Employee Orientation
Request feedback from other employees about the new employee’s performance and acculturation
Schedule employee for required training

Within the First Six Months
Revisit performance standards and work rules
Schedule performance appraisal meeting
Provide opportunities for the new employee to meet people from other departments