Orientation of a new employee is the shared responsibility of the supervisor, the new employee, and the workgroup members. Use the items below as a suggested checklist for helping a new employee get settled in. Some items have specific time frames and deadlines. Others depend on the position, responsibilities, and location. If you are a county agent or a staff chair bringing on a county agent see the checklist specific to that position.

**Things To Do Before the New Employee Begins Work:**

- Review the online Personnel Employment Procedures, Hiring Policies section of our Policy Manual and complete all appropriate hiring forms ([http://intranet.uaex.edu/policy/personnel/HiringPolicies/hiring_policies.asp](http://intranet.uaex.edu/policy/personnel/HiringPolicies/hiring_policies.asp)).
- Ensure supervisor or support staff has completed e-Verify online instruction and test prior to new employee arriving at job. At least 3 hours needs to be set aside for the assigned person to complete the e-Verify training. Contact HR for information.
- Respond to the email from Information Technology regarding accounts & services needed, org and fund numbers, secretarial assignment (LRSO only), ePrint access and email lists.
- Develop an orientation plan and calendar for at least the first week, identifying tasks for the employee to complete, documents to review, introductory meetings with other staff, etc. Share the orientation plan with the immediate workgroup, asking them to welcome the new employee and encourage their support and help in orientation.
- Prepare work space with appropriate furniture and equipment, such as computer, phone, mailbox, supplies, a place to lock up valuables, etc.
- Discuss with new employee where to park, dress code, work hours, etc. Remind the new employee they will need to present documents to verify identity and employment eligibility on the first day of work.
- Clear your schedule so you can provide focused support and help in orienting the new employee the first week. Plan to take the new employee to lunch.
- Other:
Supervisor Checklist for New Hires
Revised March 2010

Things To Do When the New Employee Begins Work
Some tasks have required completion deadlines (noted in bold). Others may take several days or weeks to accomplish, depending on the position and location. Items listed below are common ones and do not include position-specific tasks and responsibilities.

Day 1 – 30

Relationships and Organizational Information

The supervisor should be in the office on the employee’s first day to welcome the new employee, discuss the orientation plan, and provide introductions. Other tasks:

☐ Provide an overview of the office or department’s function using an organizational chart. Include the relationship of the workgroup to others within the organization.
☐ Discuss relationships between the variety of Extension employees, including agents, specialists, support staff, and others.
☐ Introduce the new employee to co-workers and managers within (and outside) the department. Introduce the employee to any non-Extension contact that may be necessary for them to function effectively. This may include public officials, key stakeholders, committee members, and media representatives.
☐ Identify persons to go to for help and supervisor availability when needed by employee.
☐ Discuss regularly scheduled staff or faculty meetings.
☐ Send an e-mail introducing the new employee to the organization.
☐ Take the new employee to lunch.
☐ Arrange to meet the new employee at the end of the day to answer any questions.
☐ Other:
Paperwork

☐ On the first day of work, the employee must present documents to verify identity and employment eligibility for completion of the Form I-9. The form must be signed by both the employee and the supervisor. The hiring supervisor must send the following documents in a confidential envelope directly to the Human Resources Office who must receive it within 3 days of the employee’s start date.
  - Form I-9, Employment Eligibility Verification with the E-Verify case verification number written on it.
  - Copies of the supporting documents presented for the Form I-9
  - Copy of the E-Verify Case Details Page

☐ Remind employee to review the new hire packet from Human Resources, including the Code of Ethics policy and acknowledgement form which needs to be signed and forwarded to Human Resources.

☐ The employee is responsible for returning the signed benefits forms to Human Resources within 31 days of the start date.

☐ Other:

Facilities and Housekeeping

☐ Show the employee her/his desk (or office), where to store personal belongings, and other facilities information.

☐ Provide a tour of the facility. The location of restrooms, water fountain, vending machines, parking areas and entrances, fire exits, bulletin boards, supplies, copier, fax machine, and cafeteria/break areas should be noted.

☐ Discuss personal and building security. Explain afterhours access to the building.

☐ Order office and building keys or access cards. In the State Office, office & building keys have to be signed for. Usual turnaround time is one day. Key cards can usually be obtained the same day they start.

☐ Order a door name plate and name tag for the new employee.

☐ Order business cards, if appropriate.

☐ Other:
Employee Performance and Expectations

☐ Discuss Extension’s mission, customer service philosophy and organizational culture.
☐ Discuss how the new employee’s position supports Extension’s mission.
☐ Review and clarify the new employee’s position description. Provide the new employee with a copy.
☐ Discuss employee introductory probationary period with a copy of the policy.
☐ Describe expectations of first work assignments.
☐ Discuss required plans and reports including AIMS.
☐ Arrange a schedule to review employee’s progress throughout the first 3 or 6 months, depending on position.
☐ Review the Extension Policy Guide access and index with the employee. Include a review of civil rights policies and the AA/EEO website at http://www.uaex.edu/depts/affirmative_action/default.htm
☐ Discuss office procedures, such as hours including break and meal periods, check in and out during the day, web and phone usage, office smoking policy, work schedule location, pay dates and procedures, overtime and other forms of compensation, leave (sick and vacation), office closings, holidays, etc.
☐ Discuss professionalism (such as dress, behavior, confidentiality, and etiquette) and attendance expectations.
☐ Discuss promotion opportunities, if applicable.
☐ Discuss membership in professional associations.
☐ Describe in-service training opportunities (internal and external) and formal new employee orientation workshops.
☐ Other:
Processes, Systems and Tools

- Explain telephone usage and voice mail. Have the new employee set up their voice mail with appropriate greetings.
- Provide a list of phone numbers of colleagues and emergency contacts.
- Discuss passwords needed and how to get them.
- Introduce employee to Extension systems and tools, such as email (office and remote log-on), Extension web pages, location of online Policy Manual, online Personnel Directory, etc.
- Explain regular mail system (interoffice/dispatch, postage, packages).
- Review fire and other emergency procedures.
- Discuss procedures for obtaining or purchasing work supplies and equipment.
- Provide a listing of fund and org numbers (if appropriate).
- Introduce employee to the New Employees Welcome Center at http://www.uaex.edu/newemployees. Orient them to the Extension web site for travel, reimbursement, subject matter, personnel, and policy information. Orient new employee to the Division of Agriculture website for time sheet and other policies. Explain the difference between Spot, www.uaex.edu, and the Division of Ag website.