

# DEPARTMENTAL CHECKLIST FOR NEW EMPLOYEES AND TRANSFERS

## Conducted by Employee's Supervisor

Employee Name: \_\_\_\_\_ Working Title: \_\_\_\_\_

Department: \_\_\_\_\_ Effective Date of Hire: \_\_\_\_\_

(Check one) ☐ Original appointment; ☐ Promotion; ☐ Other: \_\_\_\_\_

### DIRECTIONS

This checklist is provided as a guide to assist the supervisor in acquainting the new employee with the department and the University. It is intended to serve as an outline of the minimum information that should be discussed with the employee during the first days following the date of employment. It is provided as a resource for supervisors to ensure the employee is briefed on important state and university policies/procedures in addition to any other department specific information as determined by the supervisor. The checklist is maintained on the Human Resources website under the "Forms" tab.

1. The checklist should be completed for all salaried employees newly hired to the agency or transferred from another department or state agency.
2. The checklist should be completed with the new employee within the first week of employment and the original copy maintained in department's personnel files. Do not return the completed checklist to Human Resources.
3. The employee should be provided a copy of the completed checklist. The completed checklist should be signed by both the supervisor and the employee.
4. The checklist may be used in acquainting new hourly and/or part-time employees to the University.
5. Contact the Department of Human Resources at 831-5008 for further information or assistance.

### CHECKLIST

(Please read directions before completing the checklist.)

#### WORK ENVIRONMENT

- ☐ Co-workers and supervisors. (Introduce and explain their work relationships.)
- ☐ Students. (Discuss the importance of keeping relationships with students on a professional level.)
- ☐ Department and Building. (Explain purpose, activities and operations of the department. Tour area noting normal employee entrance, exit, lounge, lunch room, coat rack, water fountain, restrooms, drink and snack machines, location of incoming and outgoing mail and campus mail system, etc. Provide keys as required; explain key responsibility.)
- ☐ Parking. (Indicate parking facilities for work area.)
- ☐ Equipment. (Explain use, location and how to obtain supplies; explain restrictions on equipment usage for personal reasons.)
- ☐ Telephone. (Explain how the telephone should be answered and any restrictions on use of the telephone.)
- ☐ Informal departmental activities. (Include office functions, gatherings, etc.)
- ☐ Training Opportunities. (Explain any training opportunities and what training programs may be available to the employee.)
- ☐ Travel, if applicable. (Explain nature, frequency, and how plans are made.)

#### WORK SCHEDULE

- ☐ Work Days/Hours of Work. (Specify days, starting and quitting times and shift schedule. Explain any exceptions and reasons for them.)
- ☐ Overtime. (Discuss exempt/non-exempt status under FLSA; authorization required for overtime and probability for scheduling.)
- ☐ Meal Periods and Breaks. (Normal one-hour for lunch during academic year and 30 minutes during summer schedule depending upon business needs, discuss schedule, restrictions for non-exempt employees working through lunch and break periods. Breaks are allowed at the discretion of the department head.)

#### WORK PROCEDURES AND PRACTICES

- ☐ Paycheck. (The employee will receive his/her paycheck via direct deposit unless otherwise approved by Payroll.)
- ☐ Leave. (Discuss process for applying for leaves of absence and the online leave reports.)
- ☐ University Holidays. (Explain office policy regarding staffing on holidays and compensatory leave.)
- ☐ Sick Leave. (Identify who is to be notified; give the telephone number, time to call, frequency for notifying supervisor if illness is extended and circumstances when a physician's certificate of absence may be required.)
- ☐ Personal Emergency Situations. (Review when and whom to call when absence is necessary due to personal emergencies.)
- ☐ Accidents and Injuries. (Discuss accident reporting procedures and reporting on-the-job accidents for worker's compensation. Instruct whom to notify if medical attention is necessary.)
- ☐ RU Alert Notification. (Explain the process and how to register to receive notification (log onto RU Portal, click on RU Alert tab, enter information on the online form and click submit). Determine how and where management can contact the employee during non-working hours.)

- ☐ Safety Procedures and Equipment. (Instruct employees on department safety regulations and safety equipment.)
- ☐ Emergency Procedures and Equipment and First Aid Supplies. (Explain whom to notify and what to do in case of an emergency. Locate first aid supplies and emergency equipment, demonstrate if appropriate.)
- ☐ Inclement Weather. (Discuss departmental needs should the University close when students are living on campus. Refer to the Inclement Weather Policy.)
- ☐ Dress. (Explain any dress requirement, i.e., uniforms or special apparel.)
- ☐ Food and Beverages. (Explain any restrictions regarding food and beverages in the work area.)
- ☐ Clean Air. (Explain University Smoking Policy.)
- ☐ Talking and Noise Level. (Explain any restrictions on talking with co-workers, playing radios, etc.)

#### WORK RESPONSIBILITIES AND ASSIGNMENTS

- ☐ Departmental Organization Chart. (Explain by stating names, titles and responsibilities.)
- ☐ New Job. (Explain the purpose of the department to the University, where the job fits in the department, and to whom to report for questions/clarification on future projects.)
- ☐ Position Description (Classified Staff & Admin/Professional Faculty). (Review the employee's position description and give the employee a copy of the position description.)
- ☐ Performance Expectations. (Discuss the employees performance plan and rating standards and approximate date when the performance plan & expectations (PP&E) will be ready for employee's review.)
- ☐ Performance Evaluation. (Explain how and when the employee is to be evaluated .)
- ☐ Work Assignments. (Arrange for specific work assignments and for assistance in initial performance.)
- ☐ Job Assistance. (Designate a contact person within the department to answer questions and to offer job assistance.)
- ☐ Records. (Locate any records or files necessary for the job. Explain which records are confidential and how confidential information is managed.)
- ☐ Work Area. (Present work and locate any materials necessary to the job. Demonstrate job and use of equipment where appropriate.)
- ☐ Submit Banner Authorization form to Information Technology for Banner access. (required for employees responsible for data entry into Banner, approving online time sheets, leave, personnel action forms and processes for faculty, staff, and students.
- ☐ Submit the PeopleAdmin Authorization Access form and schedule the employee for the next available monthly training. Required for all faculty and staff with responsibility for performance planning and evaluation, supervision, recruitment, and hiring approval for Classified Staff and Administrative/Professional Faculty.

I have covered the above checked items applicable to this employee,

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Supervisor signature

(Title)

(Date)

I agree that the above checked items have been covered by my supervisor and I have had an opportunity to discuss and ask questions for clarification.

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Employee signature

(Title)

(Date)

#### COMMENTS

List of other items of particular importance discussed with the employee.

#### NOTICE

Supervisors of **Classified Employees** must submit a properly completed **Position Description (PD) and a Performance Plan & Evaluation (PP&E)** form through PeopleAdmin within 30 days from date-of-hire.

Supervisors of **Administrative/Professional Faculty** must submit a completed Position Description for Administrative & Professional Faculty through PeopleAdmin within 30 days from the date-of-hire. The Performance Evaluation process for A/P Faculty is governed by the A/P Faculty Handbook