UCDAVIS

OCP HR Onboarding Checklist

Please utilize the following Onboarding Checklist to onboard staff within your unit. Position/unit specific customization (as appropriate) is encouraged based on department/position needs.

Employee Name:	Unit:	Position:
Email:	Phone:	Supervisor:
Employee Type (CAREER/TRANSFER/CONTRACT/TES/OTHER):	Employee Start Date:	Unit Support:

For reference only: Shared Services Organization Completes these items		
Required		Position-Specific (if required)
Schedule Onboarding*		Schedule background check
Employment Eligibility Form (Form I-9) w/License Reqs. *		Employee driving records (DMV Pull Notice System)
California State Loyalty Oath (UPAY 585)*		Compensatory Time Off Agreement (all non-exempt staff except TES)
Review Conflict of Interest Policy/Relatives at UCD *		
Acceptable Use Policy (IT)*		
Workers Compensation Fact Sheet*		
Child Abuse Notification*		
Elder Abuse Notification*		
Physician Designation*		
Reporting Work-Related Injury or Illness		
Provide PD to department for signatures		
Review probationary period (career positions only)		
Review FSLA exemption status		
Employee ID/Aggie Card *		
Provide direct deposit information		
Provide New Employee Welcome information *		
Register Employee for Benefits Orientation ^		
Provide transportation information *		
Provide URL for personnel policies/contracts		
Email Account Authorization and set up *		

Supervisor: **One Week Prior to Employee First Day**		
Required	**Recommended**	**Position-Specific** *(if required)*
☐ Provide first day information: parking, hours, location	☐ Send email announcing new hire via OCP All listserv (optional)	☐ Pull Driving records
☐ Provide uniform/dress code standards information	☐ Confirm background check & orientation dates with SSO/employee	☐ Set up e-file for employee
☐ Prepare employee workspace/ physical location	☐ Add employee to phone lists, directories, and databases	☐ Order name plate for workspace
☐ Order furniture/supplies for employee work area	☐ Add employee to Organizational Chart(s)	☐ Schedule fitting for uniforms
☐ Set up telephone for Employee with your dept. ATR rep	☐ Create training/collaboration schedule for first week	☐ Order protective clothing and equipment
☐ Submit IT onboarding form for computer & network set-up	☐ Schedule appointments with key personnel	☐ Contact IT for mobile device set-up
☐ Order name badge	☐ Acquaint Employee with UC Davis/Department	☐ Designate a mailbox for Employee
☐ COVID-19 Screening & Vaccine Policy	☐ Review Anti-Racist learning and reflection tool	☐ Contact IT for printer code

Supervisor & Employee: **First Day**				
	Required		Recommended	Position-Specific *(if required)*
	Tour of the department, building and workstation		Lunch with new Employee and key colleague(s)	Review department's website/intranet
	Introduce to colleagues and department head		Review local unit transportation & parking options	Provide relevant personnel policy manual
	Issue access keys/card		Allow time for Employee to get settled into work area	Review Fair Share Fee or union dues
	Ensure employee has access to email		Provide contact information for technical support	Issue mobile device and ensure accessibility to email
	Review department vision, mission & relationship to job		Review email & internet protocol	Provide Hazardous Substances Material Safety Data Sheet
	Employee, Supervisor & Department Head to review PD		Review importance of saving files to shared network	Issue protective clothing and equipment
	Review process to obtain supplies/materials		Review Front Door website	Locate the emergency shower and protective clothing
	Provide information on ergonomic evaluation process		Review Injury Illness Prevention Program	Review telephone system and etiquette
	Discuss pay periods, paychecks/Surepay		Sign up for WarnMe Emergency Notification Service	Overview of Campus and U.S. Mail
	Review probationary period (non MSP Career Only)		Review calendar (academic and general)	Read & Sign Vehicle Use Form
	Review FLSA exemption sheet		Review dress and personal appearance standards	Read & Sign Electronic Device Policy
	Discuss hours of operation, schedules, rest periods		EE to watch New Employee Orientation e-course	Review Travel and Entertainment Expense Policy
	Review time reporting system		Review online campus directory	Order Corporate Card/Purchasing Card
	Discuss workplace flexibility		Calendar weekly progress check-ins	Order business cards
	Review Absence from Work policy or contract articles		Discuss system access needs & begin applications	Add to birthday list (if employee celebrates)
	Discuss salary, overtime, shift and weekend differential			Review & Complete CTO Form (non-exempt employee)
	Discuss incentive awards, merit eligibility & cycles			
	Review disaster and evacuation procedures			
	Locate the location of fire extinguisher and exits			
	Provide Policy: Nondiscminiation and Affirmative Action			
	Provide Policy: Sexual Harrassment			
	Provide Policy: Substance Abuse			
	Provide Policy: Smoking			
	Provide Policy: Conflict of Interest			
	Provide Policy: Violence in the Workplace			
	Provide Policy: Whistleblower Protection			

Employee: **First Week**		
Required	Recommended	Position-Specific *(if required)*
Review UC Ethical Values and Conduct	Progress Check-In(s) with Supervisor	Supervisory Training Program
Review UC & UC Davis Mission	Review overall campus structure	Add standing meetings to calendar
Review UC Davis Strategic Plan: To Boldly Go	Review department/division organizational charts	Complete Safe Driving e-course
Review Diversity Calendar	Complete Ethics e-course	Review CANRA policy
Complete New Employee Orientation e-course	Register for New Employee Welcome event	Review Workplace Safety

Employee: **First Month to Sixth Month**		
Required	Recommended	Position-Specific *(if required)*
Enroll in benefits (30 day deadline)	Supervisor: Weekly review of goals and deliverables	
Supervisor to introduce Individual Development Plan	Monthly reviews	
Complete the Principles of Community online course	Share info about social media guidelines	
Supervisor to introduce SMART Goals	Share info re: Administrative Advisory Committees	
3-Month Probationary Evaulation (New, non-MSP only)	Review progress on training plan	
6-Month Probation Period Review (New, non-MSP only)	Schedule meeting with Supervisor to sign PD	
Complete Cyber Security e-course (about 6 weeks)		
Complete Sexual Harassment prevention e-course		