UCDAVIS

OCP Onboarding Checklist

*= New UCD campus only, doesn't apply to any other type of hire
^=50%+ appointments with durations a year or more

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

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

To be Completed in Partnership with the Shared Services Organization

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

Supervisor: Prior to First Day

Required	Recommended	Position-Specific (if required)
Provide first day information: parking, hours, location	Send email announcing new hire via OCP All listserv	Pull driving records
Provide uniform/dress code standards information	Confirm background check & orientation dates with SSO	Set up e-file for Employee
Prepare Employee's work space	Add Employee to phone lists, directories, and databases	Order name plate for work space
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
	Acquaint Employee with UC Davis/Department	Designate a mailbox for Employee
		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 with 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 sign 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 eval. Process	Review Injury Illness Prevention Program	Review telephone system and etiquette
Discuss pay periods, paychecks/Surepay	Sign Up for Warn Me 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 status	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

Supervisor & Employee: First Day (continued)

Discuss workplace flexibility		Order business cards
Review Absence from Work policy or contract articles	Calendar weekly progress check-ins	Add to birthday list (if employee celebrates)
Discuss salary, overtime, shift and weekend differential	Discuss system access needs & begin applications	Review & complete CTO Form (non-exempt employees)
Discuss incentive awards, merit eligibility & cycles		
Review disaster and evacuation procedures		
Locate the location of fire extinguisher and exits		
Provide policy: Nondiscrimination 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 Missions	Review overall campus structure	Add standing meetings to calendar
Review UC Davis Vision of Excellence	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 of performance expectations	
Complete the Principles of Community online course	Share info re: the UC Davis Social Network	
Supervisor to introduce SMART Goals	Share info re: Administrative Advisory Committees	
3-Month Probationary Evaluation (New, non-MSP only)	Review progress on training plan	
6-Month Probation Period Review (New,non-MSP only)		
Complete Cyber Security e-course (about 6 weeks)		
Complete Sexual Harrassment prevention e-course		

Link not working/incorrect information? Please send an email to OCP-Personnel@ucdavis.edu

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