

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)
<a href="#">California State Loyalty Oath (UPAY 585)*</a>	<a href="#">Compensatory Time Off Agreement (all non-exempt staff except TES)</a>
<a href="#">Review Conflict of Interest Policy/Relatives at UCD *</a>	
<a href="#">Acceptable Use Policy (IT)*</a>	
<a href="#">Workers Compensation Fact Sheet*</a>	
<a href="#">Child Abuse Notification*</a>	
<a href="#">Elder Abuse Notification*</a>	
<a href="#">Physician Designation*</a>	
<a href="#">Reporting Work-Related Injury or Illness</a>	
Provide PD to department for signatures	
Review probationary period (career positions only)	
<a href="#">Review FSLA exemption status</a>	
Employee ID/Aggie Card *	
<a href="#">Provide direct deposit information</a>	
<a href="#">Provide New Employee Welcome information *</a>	
<a href="#">Register Employee for Benefits Orientation ^</a>	
<a href="#">Provide transportation information *</a>	
<a href="#">Provide URL for personnel policies/contracts</a>	
Email Account Authorization and set up *	

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

Supervisor: <b>Prior to First Day</b>		
Required	Recommended	Position-Specific <i>(if required)</i>
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	Set up e-file for employee
Prepare Employee workspace	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
<a href="#">Set up telephone for Employee with your dept. ATR rep</a>	Create training/collaboration schedule for first week	Order protective clothing and equipment
<a href="#">Submit IT onboarding form for computer &amp; network set-up</a>	Schedule appointments with key personnel	Contact IT for mobile device set-up
<a href="#">Order name badge</a>	<a href="#">Acquaint Employee with UC Davis/Department</a>	Designate a mailbox for Employee
<a href="#">COVID-19 Screening &amp; Vaccine Policy</a>		Contact IT for printer code

Supervisor & Employee: <b>First Day</b>			
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	<a href="#">Review local unit transportation &amp; parking options</a>	<a href="#">Provide relevant personnel policy manual</a>
	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	<a href="#">Provide contact information for technical support</a>	Issue mobile device and ensure accessibility to email
	Review department vision, mission & relationship to job	Review email & internet protocol	<a href="#">Provide Hazardous Substances Material Safety Data Sheet</a>
	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	<a href="#">Review Front Door website</a>	Locate the emergency shower and protective clothing
	<a href="#">Provide information on ergonomic evaluation process</a>	Review Injury Illness Prevention Program	Review telephone system and etiquette
	Discuss pay periods, paychecks/Surepay	<a href="#">Sign up for WarnMe Emergency Notification Service</a>	Overview of Campus and U.S. Mail
	<a href="#">Review probationary period (non MSP Career Only)</a>	<a href="#">Review calendar (academic and general)</a>	<a href="#">Read &amp; Sign Vehicle Use Form</a>
	Review FLSA exemption sheet	Review dress and personal appearance standards	Read & Sign Electronic Device Policy
	Discuss hours of operation, schedules, rest periods	<a href="#">EE to watch New Employee Orientation e-course</a>	<a href="#">Review Travel and Entertainment Expense Policy</a>
	<a href="#">Review time reporting system</a>	<a href="#">Review online campus directory</a>	Order Corporate Card/Purchasing Card
	<a href="#">Discuss workplace flexibility</a>	Calendar weekly progress check-ins	<a href="#">Order business cards</a>
	<a href="#">Review Absence from Work policy or contract articles</a>	Discuss system access needs & begin applications	Add to birthday list (if employee celebrates)
	Discuss salary, overtime, shift and weekend differential		<a href="#">Review &amp; Complete CTO Form (non-exempt employee)</a>
	Discuss incentive awards, merit eligibility & cycles		
	Review disaster and evacuation procedures		
	Locate the location of fire extinguisher and exits		
	<a href="#">Provide Policy: Nondiscrimination and Affirmative Action</a>		
	<a href="#">Provide Policy: Sexual Harrassment</a>		
	<a href="#">Provide Policy: Substance Abuse</a>		
	<a href="#">Provide Policy: Smoking</a>		
	<a href="#">Provide Policy: Conflict of Interest</a>		
	<a href="#">Provide Policy: Violence in the Workplace</a>		
	<a href="#">Provide Policy: Whistleblower Protection</a>		

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

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

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