

Orientation/Socialization Checklists

UCLA
LIBRARY

New Employee Checklist

Employee Information

Name:	Position:
Hire date:	Library/Dept.:
	Supervisor:

Prior to First Day of Employment

- Respond to letter/e-mail from Library Human Resources confirming appointment and confirm start date
- Visit the UCLA Transportation website to learn about parking/commuting options:
 - o www.transportation.ucla.edu
- Review campus map to locate relevant buildings and parking lots
 - o Review parking instructions for first day of employment and allow ample time
- Visit and peruse the Campus Human Resources website, UCLA Payroll and the At Your Service websites to learn about employment and benefits
 - o <http://www.chr.ucla.edu>
 - o <http://www.payroll.ucla.edu>
 - o <http://atyourservice.ucop.edu/>
 - Create your At Your Service login/password

First Day of Employment

- Attend LHR New Hire Sign-In Appointment (Library Human Resources, Room 22478)
 - o Bring work authorization documents to New Hire Sign-In Appointment
 - o Review and complete all New Hire Paperwork
 - o Learn about UCLA Benefits
 - o Complete paperwork to obtain UCLA parking permit or bus pass
- Obtain employee ID number from HR Representative
- Go to UCLA Parking Services to obtain parking permit, or to Central Ticket Office for bus pass
- Meet with Supervisor and begin departmental orientation
- Create your UCLA Logon ID
- Schedule appointment with UCPD for Criminal Background Check and Identification and building use permit **within first week of employment**
- Organize work area, read orientation materials, etc.
- Review departmental procedure manuals

Your First Weeks of Employment

- Review Supervisor's checklist to understand orientation process
- Obtain your Bruin Card
- Submit UCPD Criminal Background Check and Identification and Building Use Permit receipt to LHR
- Read about and analyze your Benefits Package
- Enroll in benefits during your Period of Initial Eligibility (PIE)—31 days after your hire date via the [At Your Service](#) website
- Review Personnel Policies for Staff Members or Labor Contract if represented by an exclusive bargaining agent (union)
- Learn about your vacation and sick leave accruals, usage and reporting

- Explore the UCLA website, the UCLA Library's public website and the Library Staff Intranet website:
 - o <http://www.ucla.edu>
 - o <http://www.library.ucla.edu>
 - o <http://staff.library.ucla.edu/>
- Attend CHR New Employee Orientation Training session
- Check the UCLA Directory (<http://www.directory.ucla.edu/search.php>) to confirm your name and department information is correct
- Review campus emergency procedures on the [EH&S website](#): under [Emergency Management](#)

Your First Months of Employment

- Check your medical plan ID card when it arrives to ensure it reflects the correct information and your benefits information
- Review your paycheck to confirm it reflects your health and welfare choices, payroll deductions, personal information and more
- Complete University of California Office of the President's (UCOP) mandatory Sexual Harassment Training for Supervisors (if applicable) -- UCOP generates invitation to online training based on job classification or EDB code input by LHR staff
- Complete UCOP's Ethics & Compliance Program: <http://www.directory.ucla.edu/search.php>

Notes:

UCLA
LIBRARY

Supervisor New Hire Checklist

Employee Information	
Name:	Position:
Hire date:	Library/Dept.:
	Supervisor:

Prior to the Employee's Arrival

- Prepare new hire announcement and send to DLHR for distribution on first day initial/date _____
- Review details of email from LHR confirming selected candidate start date and sign-in appointment time initial/date _____
- Review copy of appointment letter sent to selected candidate: initial/date _____
- Prepare departmental staff for the arrival of the selected candidate:
 - Make announcement to departmental staff about hire of selected candidate initial/date _____
 - Add name to departmental organizational chart initial/date _____
 - Set-up meetings with Departmental staff as appropriate initial/date _____
 - Determine who will orient and train selected candidate on which tasks/responsibilities/processes initial/date _____
- Ask for volunteers from your staff to serve as the "buddy" during the first six months; designate someone who has been employed w/the UCLA Library at least one year (optional) initial/date _____
- Meet with the "buddy" before the employee arrives and discuss what role they will play and what activities the buddy will perform. Such activities might include: introductions to departmental staff; tours of the department, library and campus; being available to answer questions; having lunch with the employee, including the employee in library social activities initial/date _____
- Create schedule for first day initial/date _____
- Draft a plan for the first few weeks, which includes: meetings, tours, training, etc. initial/date _____
- Create agenda for first meeting with employee and plan to discuss employee schedule initial/date _____
- Review initial jobs assignments and training plans initial/date _____
- Determine where the employee's work station or office will be and make arrangements as necessary to assign this work space to the employee initial/date _____
- Prepare the employee's work space:
 - Arrange for computer for employee initial/date _____
 - Arrange for telephone, as appropriate initial/date _____
 - Ensure employee has a safe, secure place for personal belongings initial/date _____
 - Have work area cleaned/straightened; remove any personal effects left by previous employee initial/date _____
 - Stock desk with basic supplies (paper, pens, pencils, etc.) initial/date _____
 - Supply work space with telephone/campus directories and Library Telephone Directory initial/date _____
- Determine if/which keys will be needed and issued initial/date _____
- Send key request to Building Services or appropriate individual(s) within the Library (*key numbers needed) initial/date _____
- Create Supervisor file for selected candidate initial/date _____

Employee's First Day of Employment

- Arrange for refreshments on first day of work to welcome employee (optional) initial/date _____
- Be available to pick up and greet the employee after the LHR sign-in initial/date _____
- Pick up employee at LHR and escort to department and workstation initial/date _____
- Meet with the employee to orient them to the workplace and provide an overview of the first day's activities initial/date _____
- Review resources for employees (include links to these sites) initial/date _____
- Explain payroll cycle/check pick-up or direct deposit options initial/date _____

UNIVERSITY OF CALIFORNIA, LOS ANGELES
Supervisor New Hire Checklist

- Explain leave reporting policies and procedures and time reporting system (timesheets) initial/date_____
- Discuss your availability during the orientation. Include your supervisory approach/philosophy initial/date_____
- Provide employee with department and Library organization charts initial/date_____
 - Discuss reporting relationships and lines of authority initial/date_____
 - Discuss organizational structure and interrelationships initial/date_____
- Provide tour of immediate work area and department ensuring that the employee knows the basics (public/staff entrances, work areas, restrooms, fire exits, etc.) initial/date_____
- Introduce employee to all department staff and briefly describe each person's function initial/date_____
- Have lunch with employee individually or in a group (optional) initial/date_____
- Discuss work schedule and outline departmental notification process for illness, lateness, or schedule adjustment initial/date_____
- Explain to employee how to obtain UCLA Logon ID (Bruin Online Account) initial/date_____
- Complete New Account Request Form to set up via (<http://services.library.ucla.edu/welcome/netcreatedelete.html>) initial/date_____
 - Email Account initial/date_____
 - Network Account initial/date_____
 - Oasis Access (If employee needs Oasis system access see Department Security Administrator) initial/date_____
- Allow time for employee to organize work area, read orientation materials, obtain parking permit, etc. initial/date_____
- Discuss personal use of office equipment (phone, fax, computing equip., printer, copiers) initial/date_____
- Inform the employee of his/her new phone number: initial/date_____
 - Review telephone policies and procedures, including voicemail and long distance calls initial/date_____
 - Help employee set-up voicemail initial/date_____
 - Review campus emergency telephone procedures initial/date_____
- Provide the employee with your department's campus mail address, local address, and phone/fax numbers; explain campus and U.S. mail system, how they are used and approximate delivery/pick-up schedules initial/date_____
- Review library and department policies on food and drink, headphones, etc. initial/date_____
- Discuss Emergency Procedures:
 - Suggest employee to sign up for Bruin Alert system for cell phones/PDAs initial/date_____
 - Security protocol for department (building access, visitors, etc.); discuss emergency procedures; security; escort services initial/date_____
 - Location of unit's copy of the Disaster plan; evacuation plan for your building; library unscheduled closing and hours line initial/date_____
 - Safety Program and Emergency Response initial/date_____
 - What to do if a library visitor has an accident or injury initial/date_____

Employee's First Few Days

- Give the employee a copy of his/her job description OR Statement of Responsibilities initial/date_____
- Discuss job responsibilities and Supervisor's expectations
- Determine preliminary work assignments for first two weeks, meet with employee, make assignments and describe expected outcomes initial/date_____
- Introduce the employee to the person who will be his or her trainer initial/date_____
- Discuss and schedule appropriate training sessions initial/date_____
- Set up additional departmental, library, and campus tours as appropriate to the position initial/date_____
- Create a plan for how/when to introduce employee to library and university staff outside of the department as appropriate during tours and meetings initial/date_____
- Introduce employee to staff in other departments and library administration and briefly describe each person's function initial/date_____
- Set up short welcome/orientation meetings with department head, supervisory AUL, DUL, UL, DLBES, DLHR as appropriate initial/date_____
- Provide overview of library organization; discuss library departments; history of department; unit organization and hierarchy initial/date_____

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Supervisor New Hire Checklist

- Provide employee with the link to the UCLA Library's current strategic plan; ask employee to read it within three weeks initial/date_____
- Review office protocol/procedures: files, mail, fax machine, copiers, email, supplies (explain use of equipment, location and how to obtain supplies) initial/date_____
- Discuss timesheet and leave reporting policies and procedures; overtime/comp. time (if applicable); sick/vacation accrual; department flextime (if applicable) initial/date_____
- Discuss with the employee how and to whom to request/report schedule adjustments, absences, late arrivals, illnesses, and emergencies; review attendance policies pertinent to your department initial/date_____
- Train employee how to use Outlook to access email and calendar; department listservs, etc. initial/date_____
- Set up weekly meeting between supervisor and employee for first three months initial/date_____
- Provide employee with list/schedule of any standing group meetings they are required to attend initial/date_____
- Introduce designated "buddy"/mentor (optional) initial/date_____
- Review location of bulletin boards and special notices within unit initial/date_____
- Add employee's information to departmental contact list/phone tree initial/date_____
- Provide employee with contact information for Supervisor and department as appropriate initial/date_____
- Distribute keys/assign Omni lock codes to employee as appropriate initial/date_____
- Arrange times with the employee to orient them to:
 - o Library's public website: www.library.ucla.edu initial/date_____
 - o Library staff intranet: <http://staff.library.ucla.edu/> initial/date_____
 - o University Librarian's Blog: <http://blogs.library.ucla.edu/universitylibrarian/> initial/date_____
 - o Library SharePoint sites, sandbox, etc. initial/date_____
 - o Departmental websites, blogs, wikis, etc. initial/date_____
 - o Relevant University websites: CHR Training and Development, UCLA campus, etc. initial/date_____
- Advise the employee to review departmental procedure manuals initial/date_____
- Explain Systems and Facilities Help Desk procedures initial/date_____

Employee's First Few Weeks

- Discuss the Library Strategic Plan and the Unit Work Plan with employee after both documents have been read:
 - o Explain the function, mission, and priorities of your department in the context of the strategic plan initial/date_____
 - o Discuss philosophy and general goals of unit within the context of the UCLA Library and UC initial/date_____
 - o Discuss/explain the importance of the employee's job initial/date_____
 - o Provide the employee with a copy of the current fiscal year Unit Work Plan and discuss the status of the work plan initial/date_____
 - o Develop a timeline for an orientation work plan for the employee that extends through the end of the fiscal year initial/date_____
 - o Document their orientation work plan in writing for Supervisor, Dept. Head, and/or AUL approval initial/date_____
- Explain performance management procedures for type of appointment and performance expectations initial/date_____
 - o Explain librarian salary scale, peer review, and career status process initial/date_____
 - o Explain staff salary scale, performance evaluation cycle and career status process initial/date_____
- Provide appropriate and timely feedback of work as it is performed and clarify performance expectations as needed initial/date_____
- Review and discuss UCLA Library's Learning & Development Curricular Framework:
 - o Determine immediate need for specific internal or external training and register as appropriate initial/date_____
 - o Determine core competencies needed for the job initial/date_____
 - o Assess skills as they relate to job duties, evaluate the need for training, and schedule on the job or external training as appropriate initial/date_____
 - o Use Learning & Development Curricular Framework to identify potential courses initial/date_____
 - o Assess basic computing skills and evaluate the need for further training initial/date_____
 - o Assess supervisory skills and evaluate the need for further supervisory training and UCLA specific training initial/date_____

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Supervisor New Hire Checklist

- Assess need for UCLA Personnel Systems training as it relates to the job duties and register for appropriate courses initial/date_____
- Assess need for UCLA Financial Systems training as it relates to the job duties and register for appropriate courses initial/date_____
- Assess need and interest in UCLA CHR Certificate Programs and register for appropriate courses:
 - [UCLA CHR Level 1 Supervisory Certificate Series](#) initial/date_____
 - [UCLA CHR Financial Management Certificate Program](#) initial/date_____
- Assess need to attend the UC Business Officer Institute; discuss with Deputy University Librarian and nominate as appropriate initial/date_____
- Determine eligibility for internal career/leadership development programs, and provide information to employee
 - [UCLA Staff Enrichment Program](#) initial/date_____
 - [UCLA Professional Development Program](#) initial/date_____
 - [UC Management Skills Assessment Program](#) initial/date_____
- Assess need and interest in external leadership development programs; e.g., ACRL/Harvard Leadership Institute, Frye Leadership Institute, etc. initial/date_____
- Outline a written Learning & Development Plan initial/date_____
- Discuss travel and reimbursement policies and procedures and provide links to appropriate Library, UCLA and UC websites initial/date_____
- Schedule discussion of employee’s workstation with Library Ergonomic Coordinator (LHR Coordinator) to ensure the workstation arrangement meets the employee’s needs initial/date_____
- Request order of business cards (optional) initial/date_____
- Discuss meetings (Library, department, etc.) and which meetings employee is expected to attend initial/date_____
- Outline departmental resources and sources of information initial/date_____

Employee’s First Few Months

- Evaluate staff employee during fourth month of probationary period initial/date_____
- Provide regular and timely feedback on work performed initial/date_____
- Make sure all departmental and other tours have been completed initial/date_____
- Explain availability of library meeting rooms and procedures for making reservations initial/date_____

Administrative Items for Supervisor during First Days/Weeks of Employee’s Employment

- Complete staff directory form and submit to LHR (get staff directory form online) initial/date_____
- Add employee to department listservs and routing lists. If applicable, also add him/her to the department telephone tree initial/date_____
- Schedule employee for new student training session with LHR/LBES representative if employee supervises students initial/date_____
- Confirm that employee has attended CHR New Employee Orientation initial/date_____

Notes:

*For all staff positions: to be submitted to LHR in conjunction with 4 month probationary period evaluation.
 For all librarian positions: to be submitted to LHR in conjunction with 6 month probationary period evaluation.
 This document will be filed in the employee’s personnel file in LHR.*

Employee Signature	Date	Department Head Signature	Date
Supervisor Signature	Date	AUL Signature	Date

University of Georgia Libraries New Employee Checklist

<http://www.libs.uga.edu/humres/training/newemployee.html>

Human Resources Department (rev. 08/10)

Name: Start Date:
Title: Supervisor:
Department: Classification/Rank:

I. Payroll/Benefits Information

- 1st paycheck** – _____ – During your UGA online orientation you will have an opportunity to fill out a **Direct Deposit** form.
- To view electronic check stub go to the **University's Self Service Website** - <https://employee.uga.edu/FacStaff/index.jsp>
- Benefits can be effective on your start date, anytime between your start date and the end of the month, or the first day of month following your start date. Q & A Benefits Information Session (1st & 3rd Mondays, 9:00-10:30 a.m. @ UGA HR, Training & Development) Enroll online using **HR Connection Guidelines for New Employees**: http://www.hr.uga.edu/benefits/hrc_user_guide.pdf
- COBRA** - <http://www.hr.uga.edu/benefits/cobra.html>
- Teachers Retirement System of Georgia (TRS)** www.trsga.com – Participating mandatory. You will receive a welcome letter from TRS with instructions to visit the TRS website to create a user account where you may designate beneficiaries, update personal information, and check account balances.
- Optional Retirement Plan (ORP) <http://www.hr.uga.edu/benefits/bensumm/orp.html> (Faculty, key administrators and newly-hired exempt benefit-eligible staff have the opportunity to make a one-time irrevocable decision to participate in an ORP in lieu of the TRS. This decision must be made within 60 days following employment.)

II. The Basics

- Establish UGA MyID account & create an Email Account <https://myid.uga.edu/> Register for UGA Alert <http://ugaalert.uga.edu>
- Registering preferred e-mail account for official UGA communications www.emailinfo.uga.edu
- GRAPEVINE Posting Policy (Libraries' listserv) <http://www.libs.uga.edu/staff/grapevine.html>
- Guidelines Register for Online Calendar Account www.uga.edu/eits/calendar Parking procedures www.parking.uga.edu

III. Schedule and Leave

- Work Schedule www.libs.uga.edu/staff/worksched.html University Holidays www.uga.edu/news/holidays/
- Sick & Annual leave accrual/usage http://www.hr.uga.edu/benefits/bensumm/paid_summ.html
- Other Leave <http://askuga.uga.edu/default.asp?id=961&SID=&Lang=1>

IV. Services and Fringe Benefits

- Staff Borrowing Privileges http://www.libs.uga.edu/access_services/borrowing/staff.html
- Training & Development: <http://www.libs.uga.edu/humres/training/index.html>
- UGA Campus Transit www.busfin.uga.edu/transit/ Athens Transit www.athenstransit.com
- UGA Extras http://www.hr.uga.edu/benefits/uga_extras.html
- Ramsey Student Center http://www.recsports.uga.edu/rec_template_1.php?page_ID=1143842393
- Tuition Assistance Program (TAP) [http://www.reg.uga.edu/or.nsf/preview/\(TAP\)%20Homepage](http://www.reg.uga.edu/or.nsf/preview/(TAP)%20Homepage)
 - Contact the UGA TAP Coordinator if you have questions: Jack Pannecoucke, Tel: (706) 542-9362, Email: jep@uga.edu

V. About the Libraries

- Mission Statement <http://www.libs.uga.edu/staff/missionstate.html> Facilities: <http://www.libs.uga.edu/libinfo.html>
- Special Collections: http://www.libs.uga.edu/special_collections/index.shtml
- Libraries Departments: <http://www.libs.uga.edu/admin/depthhead.html> Use of Libraries Logo <http://www.libs.uga.edu/logos/>
- Libraries Blog <http://www.libs.uga.edu/blog/> Personnel News <http://www.libs.uga.edu/humres/persnews/persnews.html>
- Staff Recognition // ASSET Awards <http://www.libs.uga.edu/asset/index.html>
- University Librarian and Associate Provost: Dr. William Gray Potter <http://www.libs.uga.edu/admin/index.html>

University of Georgia Libraries New Employee Checklist

Hiring Department/Unit (rev. 08/10)

Name: Start Date:
 Title: Supervisor:
 Department: Classification/Rank:

Probationary Evaluation Schedule	1 st Due	2 nd Due	3 rd Due	4 th Due	5 th Due	Prob. Due
http://www.libs.uga.edu/staff/appraisal.html						

I. The Basics

- UGA Online Orientation <http://www.hr.uga.edu/ori/orient.html>
- Departmental tour Library Tour (location of restrooms, vending, staff lounge, 'Tween the Pages)
- Various departmental policies (food, drink, noise, cell phone use, parties, office hours, etc.)
- Office key assignment (Becky Wortham - bwortham@uga.edu) Computer log-in, set-up, access E-mail log-in, set-up
- Establish and register a preferred e-mail account for official University communications www.emailinfo.uga.edu
- Departmental administrative and organizational communication protocols.

II. Job responsibilities/evaluation

- Review of job description Departmental overview/goals/projects
- Probationary & Annual evaluation procedures www.libs.uga.edu/staff/appraisal.html Libraries Mission/Strategic Plan related to Dept.

III. Schedules, Attendance and Leave

- Work schedule Break & lunch schedules Timesheet/payroll procedures and schedules
- Use and request of annual leave & scheduled sick leave Notification process when ill or tardy
- Use of work time for training, professional development, educational purposes
<http://www.libs.uga.edu/staff/worksched.html>
- Independent professional activities policy <http://www.libs.uga.edu/staff/independentprof.html> Travel & Funding Guidelines
<http://www.libs.uga.edu/humres/training/travelguidelines.html>
- Family and Medical Leave http://www.hr.uga.edu/fmla/fmla_intro.html

III. Safety, Security & Ethics

- Personal accident/injury reporting – Worker’s Compensation <http://www.libs.uga.edu/staff/workerscompguidelines.pdf> SecureUGA (modules 1-10) <https://secure.uga.edu/> ****Mandatory****
- Building/Department emergency procedures (including links to emergency plans)
http://www.libs.uga.edu/access_services/security/index.html
- University Office of Security & Emergency Preparedness <http://www.osep.uga.edu/> USG Ethics Course <http://www.hr.uga.edu/ethics.html> ****Mandatory** You will receive an email from UGA HR when course is loaded in your eLearning Commons account.**
- University Risk Management Office >> *View the “Driving Do’s & Don’ts Training Video” (Click link, then scroll down to video)*
<http://www.doas.georgia.gov/StateLocal/Risk/Pages/RiskInsurance.aspx> ****Mandatory****

VI. Telephones/Copies/Supplies/Mail

- Personal Use of Office Equipment (Phone, Fax, Computing Equipment, Printer, Copiers)
- Long distance authorization card, if applicable Location & how to use photocopier
- Office Supply requests Mail regulations and procedures

IV. Department Handouts

New Employee _____ Date _____ Supervisor/Department Head _____ Date _____

Form that is shared with Supervisors of New Employees

Library Services - New Employee Orientation Checklist

Employee _____ Job Title _____

Supervisor _____ Start Date _____

Preparation

_____ New Employee Profile Form
(attached)

_____ Designated work space/cubicle

_____ Office supplies

_____ Paperwork and forms

_____ Meet the Team

_____ Quiet place to meet

_____ Lunch arrangements in
first week

Mandatory Activities

Date Completed

Buildings tours
(Jefferson, Adams, Madison) _____

Session with ALLS _____

Session with Deputy Librarians _____

Session with Directors/ABA & C&S _____

Session with Directors/POP & Tech Pol _____

Session with Director/Preservation & Tour _____

“Be a Book” Tour _____

ITS Security Course (online) _____

“Ethics Briefing: Standard of Conduct for
Library Employees, Online version” _____

COIN Course (in person) _____

Elective Activities

New staff will select and complete at least five of the activities listed at the bottom of this checklist in the first six months of work in Library Services.

<u>Activity</u>	<u>Date Completed</u>
------------------------	------------------------------

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Elective Activities Examples

Attend: An Exhibit, Concert in the Coolidge Auditorium, Noon Treasure Talk, Gallery Presentation by a Curator, TOPS lecture, “LC’s Digital Future and You” presentation, or similar events. See <http://www.loc.gov/today> for ideas.

Participate in at least one meeting of a Language Table or another Employee Association. See: <http://www.loc.gov/staff/page.php?name=clubs>

Watch a Webcast from <http://www.loc.gov/today/cyberlc/index.php>

Complete a course such as ILS Searching or the Research Orientation to the Library of Congress. See <http://www.loc.gov/rr/main/inforeas/orient.html> and <http://www.loc.gov/staff/idt/> for ideas.

New Employee Orientation

Unless otherwise noted arrangement for these duties will fall to the unit administrator (UA).

At hiring

- Determine if there is a need for furniture, new telephone or electrical services or computing equipment. Work with Dean's Office and Systems Department to accomplish.

One month out

- Remind Systems of computing needs

Two weeks out

- Contact Systems re new employee's arrival – verify start date and remind of computing needs
- Obtain vehicle information from new employee to acquire temporary (one week) parking permit; alternatively, if the new employee is given their position number, they can obtain a regular permit (verify up to how far in advance)
- Contact library senior administrative officer re setting up benefits meeting- get date for benefits meeting so this can be factored into early scheduling of new employee; remind about need to post announcement re new employee on email and if faculty need for notebook.
- Contact Coordinator of Library Publications and Information to get out announcements about new hire to appropriate media outlets
- Schedule appointment for new employee to meet with Dean
- Check with Dean's Office about availability of keys for new employee
- Check to see if new employee's work area is clean and stocked with supplies
- Plan welcome within department

First Day

Within the Dean's Office

- Payroll, check distribution (JG)
- Keys (JH)
- Parking Permit Info (JG)
- ID Card – through sectioning at Student Union (JG)
- Review benefits sign up and tell employee when their session is scheduled (JG)
- Secure temporary access to campus network – applications, set up machine (Systems)
- Post announcement to full-time library employees re new employee in *In the Loop*
- Speak with Dean's Office staff re name badges (MW)

Within the Department (Unit Administrator)

- Intro to office area, supplies, other staff members, students
- Telephone operation, long distance, etiquette, policies etc.,
- Photocopying, card, personal use, polices
- How to check out books for personal use
- (STAFF ONLY) probation, evaluation, vacation, sick leave
- Tour of Library/Departments

First Week

Within the Dean's Office

- Meet with Dean and receive notebook from Dean (JG, HC)

Notebook should have:

- Library Mission statement
- Phone lists, staff lists, floor maps, branch info, organization chart, statistical data, Intro to the OSU Library, Intro to OPAC, Circ info
- APLU and the land grant tradition
- Faculty Handbook
- Reappointment Promotion Tenure Info (JFP)
- 11-Month Appointment Information
- Sick Leave Process
- Fee Waiver, enrollment info
- Library committee info
- Library Faculty by-laws
- Edmon Low Library Staff Association by-laws
- Travel guidelines
- List of University Policies and Procedures available on website
- Info regarding Friends of the OSU Library and opportunities to give to the Library and the University

Within Office (UA or designated)

- Computer: public access terminals guidelines
- Review leave policies
- Attend OPAC training
- Gobi training (may be delayed due to start date/primary assignment)
- Campus Tour
- Collection Development Liaison (may be delayed due to start date/primary assignment)
- Training room session
- Approval plan (may be delayed due to start date/primary assignment)
- Reference desk policies and procedures, in-depth tour of reference area
- Role of faculty, staff, and students within dept.

First Month (UA unless otherwise designated)

- Welcome lunch with welcome committee
- Go over notebook from Dean
- History of OSU and Library (JFP)
- OPAC staff mode training, (JLJ-circ), (BB-acq)
- Begin in-depth tours of library departments

First Quarter

- Instruction- discuss and observe instructional sessions if appropriate
- Meet with appropriate AD
- Meet with Library Faculty Chair to discuss organization
- Review Reappointment Promotion Tenure info towards end of quarter (JFP)



UNIVERSITY OF
SASKATCHEWAN

University Library

engage, enlighten, explore
at your library

**University Library
Pre-Arrival Checklist for New Employees
For Supervisors & Branch Heads**

Employee Name: _____

Arrival Date: _____

- Announce new employee's arrival date, position, duties to branch staff
- Prepare the work area e.g. clean out desk and files, review remaining materials for appropriateness
- Gather and have available written materials that pertain specifically to the new employee's immediate work environment and responsibilities, including:
 - Branch staff list/organization chart with basic job responsibilities of each person
 - Email and telephone lists for staff
 - Job description
 - Diagram of evacuation route for building
 - U of S and Saskatoon telephone directories
 - Parking information
 - Collective agreement (*can be found on the HRD website*)
 - Appropriate professional organizations
- Ensure basic office supplies are available
- Order keys (*can be obtained from Tammy Hornung*)
- Install telephone or complete change order (*arrangements to be made by Tammy Hornung*)
- Arrange for computer and software installation. Email and system orientation will be arranged by the HR Manager as part of the employee's orientation.

October 2008

library.usask.ca

UNIVERSITY OF SOUTH CAROLINA

New Employee Orientation Checklist

New Employee Orientation Checklist

The Orientation and Retirement Team created this checklist to use once a new employee has been hired. Included on the checklist are things to cover beyond the needs of a specific position. We hope you find it helpful and we'd like to make it even more useful so send us any comments or suggestions.

The University's Human Resources, the Libraries' Human Resources, supervisor and new employee all have responsibilities for the successful transition of a new hire.

S=Supervisor

LHR=Libraries Human Resources

E=Employee

Once a person is hired

LHR ____ Send a welcoming letter along with a campus map. Includes contact information for any questions. Lets new hire know what kind of identification she will need to bring in to complete her paperwork.

LHR ____ Send notice of hire and first day to include in LINKS

S ____ Send a welcome note signed by everyone in the department

S ____ If the person is relocating send a city map and offer the names of realtors and rental agencies.

S ____ Give the person contact information for any questions not related to HR.

S ____ Give work and office phone numbers and e-mail addresses of anyone willing to assist in the transition (moving, orienting them to new location, etc).

Before the person begins

LHR ____ request a UserID a few days before the new hire arrives and ask UTS to send the new employee's email username to you. UTS won't set it up more than a few days before the effective date.

LHR ____ Sends information about parking decal

LHR ____ Tells supervisor new hire's email address. Communicates phone number and e-mail address to Circulation for incident report emails, Communications for LINKS distribution list, Dean's Administrative Assistant, and Computing Services for Contacts webpage.

S ____ Communicate with the new hire about logistical issues (parking, when and where to report, work schedule/hours). Offer to make referrals to stores, car repair, insurance agents, dry cleaners, credit unions, etc.

S ____ Assess immediate equipment needs

S ____ Work with Maggie Bergmans for phone and voicemail requests. Give phone number to LHR for further distribution.

S ____ Work with Cherrie Brown if keys are needed.

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New Employee Orientation Checklist

- S ____ If Millennium client access is required consult with ILS System Administrator regarding logons.
- S ____ Inform Director of Administrative Services to have a mentor assigned if new hire is in a tenure-track position
- S ____ Consider sending announcement to LINKS with a little more description of the position(if appropriate), previous work experience, and educational background.
- S ____ Inform department members when new employee is expected to relocate and begin work.
- S ____ Prepare work space
 - ___ Clean office space and stock with any essential office supplies
 - ___ Make a copy of the most recent library roster
 - ___ Make arrangements the first week for breaks and lunch.
- Assemble written materials to give to the new employee (or if on Libraries webpages or intranet communicate where materials can be found)
 - ___ organizational history
 - ___ mission statement
 - ___ vision statement
 - ___ organizational charts
 - ___ employee handbook
 - ___ Faculty Manual (university)
 - ___ Annual reports
 - ___ operations manual
 - ___ maps (library locations, campus)
 - ___ library publications
 - ___ telephone and email directory
 - ___ list / directory of key people
 - ___ pay schedule (also covered by LHR)
 - ___ job description
 - ___ training program schedule
- S ____ Make arrangements for some breaks and lunches the first week
- S ____ Consider assigning a buddy
- S ____ When you get new employee's UserID, you will need to get the Libraries Computing Services to set up a profile on the computer she/he will be using.

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New Employee Orientation Checklist

First day

S ___ Welcome new employee

S ___ Take new employee to Libraries Human Resources in the morning so paperwork can be completed and turned in to the University's HR. (Schedule ahead with Ann, expect it to take 45-60 minutes). ***will not be in VIP until his/her paperwork is entered in the system***

LHR ___ ___ Get emergency contact information

___ Tell employee someone from Benefits Office will contact him/her about a benefits orientation

___ Tell staff employee that someone from Professional Development will contact him/her about attending a University Orientation

___ Tell employee attendance at a Sexual Harassment Workshop is mandatory and information to schedule attendance will be sent

___ Tell employee a member of the Libraries Orientation and Retirement Team will contact him/her about attending a University Libraries orientation.

___ Give employee a copy of the Implementation of Variable Work Schedules

___ Tell employee it will be about two weeks before he/she can get a CarolinaCard (USC ID). Give employee the phone number to verify he/she is in the system. Tell employee where to go to get the card and what ID to take.

___ Give employee a benefits overview and go over *Information for Employees* or *Information for Supervisors*

___ Send two copies of a staff employee's position description and tell supervisor when staff employee's planning stage is due. Send information needed for planning stage (name, social, job class slot).

___ Tell supervisor what information has been sent to the new employee.

S ___ Review position description, job duties and responsibilities

S ___ Review orientation schedule

S ___ Meet co-workers

S ___ Tour the library with emphasis on immediate need and "personal" spaces (department members if dispersed, staff lounge (give the code), staff bathroom (give the code), public bathrooms, Cooper's Corner, emergency exit procedures, any likely meeting rooms, library hours)

S ___ Any applicable safety issues with equipment or people including safeguarding personal possessions, first-aid supplies, responding to fire drills

S ___ Assign an initial work task (something to be accomplished the first day, the first week)

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New Employee Orientation Checklist

Examples:

- reading (manual, Libraries webpages)
- set up voicemail
- arrange desk and office space
- Review files created by the previous job holder
- Schedule interviews with key people
- many more possibilities related to a new employee's specific position

Benefits Office will contact the new employee about attending the Benefits Orientation, and it will be within 31 days of his/her date of hire.

Sexual Harassment workshop. Those workshops are usually in November and April and LHR will inform the new employee of the details.

First Week

- S** Review personnel policies
 - Work hours and scheduling
 - Reporting work hours in Itams
 - Breaks
 - Types of leave (sick, annual, comp time, conference, release time, flex time)
 - Expectations for calling in sick
 - Inclement weather policy
 - Staff development programs/training (including campus training)
 - Dress code
 - Orientation to departmental resources (policies, procedures manuals, where to get and how to request supplies)
 - Mail policies and procedures for campus mail
 - Eating/drinking in department and library
 - Requesting time off for vacation
 - Thomas Cooper Library backdoor policy

- S** Explain phone (including voicemail if appropriate)

- S** Explain e-mail system (client, web interface). Find your department's copy of the Outlook book.

- S** If appropriate, have employee order business cards when email address is known. Remember that something can be printed on the back as well.

- S** Discuss and review unit or department policies

- S** Tour the library concentrating on key operations and relations to one's own position and department. Have the new hire meet at least one person in a department.

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Orientation and Retirement Team will try to organize tour of all the campus libraries within the first 3 months. (If position has more immediate or deeper need than a general introduction schedule meetings individually)

- S ____ Discuss library organization (including committees and teams), library goals and objectives, library-wide policies
- E ____ Individual meetings with unit staff
- E ____ Make appointments to meet key people (people identified by supervisor).
Training in core job areas
- E ____ Have new employee meet with Head, Library Computing Services if necessary regarding ergonomic computing and remote needs.
- S ____ Departmental and Common shared drives
- S ____ Review confidentiality, especially for anyone working with patron records but applicable to other situations
- S ____ Consider planning a coffeekbreak or lunch with the department to celebrate the new member's arrival
- LHR ____ Tuition reimbursement
- E ____ Recreational facilities and programs (explores USC website or materials to be created by Orientation and Retirement Team)
- E ____ Campus events (explores USC website or materials to be created by Orientation and Retirement Team)
- E ____ Recreation and wellness (explores USC website or materials to be created by Orientation and Retirement Team)
- E ____ With supervisor's approval, take a campus tour. Tours are available Monday through Friday at 11 a.m. and 2 p.m. Reserve a spot <http://www.sc.edu/visitorcenter/showSelfServiceWizard.do?admissionStatus=NE>
- E ____ Want to learn more about the university?
 - subscribe to the ANNOUNCE listserv <http://www.sc.edu/announce/join.html>
 - read USC Times backfiles <http://www.sc.edu/usctimes/>
- E ____ Want to learn more about the community?
 - Pick up a *FreeTimes* (available near Thomas Cooper Library exit and area businesses or online <http://www.free-times.com/>)
- S ____ Ask new employee what questions he/she has about:
 - __ the libraries
 - __ the university
 - __ the department
 - __ his or her job
- S ____ Determine what you expect the new employee to accomplish during the first three months on the job. Discuss with new employee.

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New Employee Orientation Checklist

Define the amount of authority the new employee has during the first three months

First Month

E ____ "Tour" the intranet (Supervisor highlights any key documents)

E ____ After new employee receives a CarolinaCard, contact Library Computing Services (Tony Branch) and give him your UserID and password so new employee can be added to Active Directory. Expect to be in the system and be able to get a CarolinaCard within the first two weeks.

Contact Library Computing Services (Randy Heard) with the barcode so you can be entered into the back door database for swiping your card to enter Thomas Cooper Library.

E ____ If you have liaison responsibilities, take your own tour of the department/college.

S ____ or
contact
Reference
Department
S ____ Once employee has a CarolinaCard explain library services available to the employee for work or enjoyment (Requesting materials in the catalog, PASCAL Delivers, Interlibrary Loan, Educational Films, audiobooks, Browsing Collection, Juvenile Collection)

S ____ Ask new employee what questions he/she has about:
 __ the libraries
 __ the university
 __ the department
 __ his or her job

Later

E ____ Attend the orientation and tour of libraries and Annex tour organized by the Libraries' Orientation and Retirement Team.

E ____ Faculty positions. The Provost holds an orientation for new faculty in August. Plan on attending at least some of it. It's a great way to meet other faculty members from across the university. You should receive an invitation <http://www.sc.edu/cte/newfaculty/>

*Compiled by Marilee Birchfield for the Orientation and Retirement Team for University Libraries at the
University of South Carolina. December 2010.*

DEPARTMENTAL ORIENTATION CHECKLIST

Employee's Full Name: _____ Employee #: _____

Department: _____ Department Contact: _____

Date of Hire: _____ Phone: _____

This checklist is designed to assist hiring departments and new employees with departmental orientation. Departmental representatives need to discuss the items below with new hires, then sign and date the back of this form to indicate completion. The completed form should be placed in the employee's departmental file.

DEPARTMENT	Completed(√)
Via Telephone with New Employee (Prior to first day of employment)	
Confirm first day/work hours	<input type="checkbox"/>
Discuss dress code/uniform distribution	<input type="checkbox"/>
Discuss payroll frequency, overtime pay (straight pay and time and one half rate)	<input type="checkbox"/>
Discuss parking arrangements; provide directions to Dept. of Parking and Transportation	<input type="checkbox"/>
Emphasize the importance of benefits/payroll appointment	<input type="checkbox"/>
Obtain emergency contact phone numbers	<input type="checkbox"/>
Complete Section 1 of I-9 (online)	<input type="checkbox"/>

Department Arrangements (Prior to first day of employment)	Completed(√)
Introduce new employee by e-mail or letter	<input type="checkbox"/>
Select current employee to assist new employee; inform current employee of expectations	<input type="checkbox"/>
Assign 1st day/1st week checklist activities to appropriate staff	<input type="checkbox"/>
Provide workspace and necessary office equipment/supplies	<input type="checkbox"/>
Prepare department orientation agenda	<input type="checkbox"/>

1st Day/1st Week	Completed(√)
Supervisor to greet new employee at start of first day	<input type="checkbox"/>
Introduce new employee to current employee who was assigned to assist	<input type="checkbox"/>
Accompany new employee to his/her office	<input type="checkbox"/>
Review computer set up, log on, e-mail, data security and Responsible Computing Handbook	<input type="checkbox"/>
Review phone number and phone system training, FAC (Forced Access Code), phone mail as applicable	<input type="checkbox"/>
Discuss/distribute office supplies, UVA directory, Charlottesville directory, name plate, etc.	<input type="checkbox"/>
Tour office/department (restrooms, break room, introduce to internal/external staff, identification/access card, and/or appropriate keys)	<input type="checkbox"/>
Discuss communication opportunities - staff meetings, department meetings, newsletters, etc.	<input type="checkbox"/>
Provide brief history of department	<input type="checkbox"/>
Provide departmental/university organizational charts	<input type="checkbox"/>

UNIVERSITY OF VIRGINIA

Departmental Orientation Checklist

<http://www.hr.virginia.edu/uploads/documents/forms/orientchecklist.pdf>

1st Day/1st Week	Completed(√)
Complete Section 2 of I-9 (online)	<input type="checkbox"/>
Brief discussion of employee's role in department/University (also discuss department's and University's mission)	<input type="checkbox"/>
Provide up-to-date written position description (job duties/scope, essential/non-essential employees) and performance expectations	<input type="checkbox"/>
Discuss Performance Planning and Evaluation (Lead @) process (general overview)	<input type="checkbox"/>
Discuss recording leave (Self Service Time and Leave -SSTL)	<input type="checkbox"/>
Discuss/provide reference for leave policies	<input type="checkbox"/>
Discuss holiday schedule and process for requesting leave	<input type="checkbox"/>
Discuss lunch/break periods	<input type="checkbox"/>
Discuss training/educational opportunities/recommended reading	<input type="checkbox"/>
Discuss tuition waiver/reimbursement—other educational opportunities	<input type="checkbox"/>
Discuss UTS (University Transit Service) - have bus schedule available in department	<input type="checkbox"/>
Discuss safety and security/emergency conditions and response, such as: a. Fire, disaster preparedness, emergency/ bomb threat procedures b. Accident injury procedures c. Emergency blue phones on Grounds (Dial 9+911) d. Inclement weather policy e. Universal precautions and HAZMAT (if applicable)	<input type="checkbox"/>
Discuss WorkMed's services (refer to: www.healthsystem.virginia.edu/internet/occupational-health/)	<input type="checkbox"/>
Discuss the Resource Fair	<input type="checkbox"/>

Approximately 3 Months From Hire Date	Completed(√)
Consider conducting 3- Month Performance Evaluation (recommended)	<input type="checkbox"/>
Discuss professional development opportunities	<input type="checkbox"/>
Recommend attending Resource Fair with department representative (should occur within 6 months of hire)	<input type="checkbox"/>

Department-Specific Requirements/Notes - to be customized by each department

Completion of Checklist: (Both new employee and departmental representative must sign below indicating checklist information has been completed in full).

Employee: _____
Signature
Date

Department Representative: _____
Signature
Date

Updated 10-12-10