

New Hire Checklist

**Employee’s Lived Name : Date of Hire:**

# Prior to First Day

* Your Recruiter/ hiring department will give you instructions on how to obtain a **parking permit** for your first day on campus. You will need to complete new hire paperwork before you can apply for a long-term permit online.
* Bring document(s) that establish identity and **employment eligibility** - <https://www.uscis.gov/i-9-central/acceptable-documents>
* If the employee is relocating and needs advice on finding housing, direct him/her to Community Housing Office - <http://www.housing.ucsb.edu/cho>-general-info.htm

# First Day

* Complete all hiring documents:
  + I-9 Documentation <http://www.bfs.ucsb.edu/payroll/forms>
  + Oath/Patent - <http://www.bfs.ucsb.edu/payroll/forms>
  + W-4/DE-4 - <https://www.ucpath.ucsb.edu/employee-self-service>
  + Direct Deposit - <https://www.ucpath.ucsb.edu/employee-self-service>
  + Invitation to Self-Identify Race, Ethnicity and Veteran Status Form (U5605) <http://ucnet.universityofcalifornia.edu/forms/pdf/u-5605.pdf>
  + Voluntary Self Identification of Disability Form (Form CC305) <https://www.dol.gov/sites/dolgov/files/OFCCP/regs/compliance/sec503/Self_ID_Forms/503Self-IDForm.pdf>
* Provide employee with Time of Hire Pamphlet- <https://www.ehs.ucsb.edu/programs-services/workers-compensation/employees-guide-workers-compensation>
* Provide employee with **Job Description**, have them review and sign and keep a copy for your department’s records.
* If applicable to your department, give the employee a Compensatory Time Election Form (non-exempt) <https://www.hr.ucsb.edu/sites/default/files/docs/forms/Represented%20Comp%20Time%20Election%20Form%2010-2019.pdf>
* Review department requirements/expectations for time reporting, working hours, lunch and break schedule
* Explain department procedures for requesting vacation, calling in for illness/absences.
* Provide or explain payroll schedule (biweekly or monthly)
* Explain how to enroll in direct deposit, apply for a corporate card, if applicable to the employee’s position.

# First Week

* Review probationary period status (typically 6 months) and performance expectations.
* Explain department expectations for personal use of phones, computers and email.
* Provide overview of University holidays, vacation and sick accrual rates, paid and unpaid leave policies or applicable collective bargaining articles.

Explain any applicable safety requirements/health & safety practices and expectations and how to report a workplace injury or illness; have employee complete required online general safety training – [UC Learning Center](https://www.learningcenter.ucsb.edu/)

* Explain department emergency procedures and what to do in the event of a fire alarm/building evacuation.
* Provide keys/access cards and overview of department security practices.
* Schedule employee to attend the next [New Employee Orientation](https://tinyurl.com/y7m5yraa)
* Show employee University web site and how to find campus resources, including Human Resources, Business & Financial Services, etc.
* Direct employee to information and resources available on the HR web page- New Employees – <http://www.hr.ucsb.edu/new-employees>
* Make an appointment for employees to have a Live Scan (be fingerprinted) if a background check is required for the position. <http://www.hr.ucsb.edu/employment/background-checks>/criminal-convictions
* Go over your department’s training/orientation plan for employee’s assigned duties and functions.

# First Month

* Overview of department organization, reporting structure, goals and mission, specific functions of section/unit where employee works.
* Training on proper operation and appropriate use of University equipment and resources, how to request /order supplies and equipment.
* Review University policies on equal opportunity, sexual harassment, email and computer usage (electronic communications policy), and other policies relevant to your department.
* Review training and development resources, career development opportunities.
* Schedule ergonomic evaluation (encouraged for employees working primarily in office/computer-based positions, required for clerical employees working over 60% with computer-based positions)