

# Orientation Checklist for Supervisors

Orientation is not a one-day event. Rather, it is an on-going process. Asking open-ended questions of your new employee is a way to ensure that you receive feedback about what is going well and what is not going well during the orientation process. Consider asking these questions:

- Are there things that others or I could do that would assist you in learning your new position?
- Are there any areas of the job that require additional clarification?
- Is this position consistent with your expectations?
- Do you have the resources you need to perform your job effectively?

**Be certain to assess performance and training needs by completing the 3-month provisional period checklist, which can be found at**

[http://www.cmu.edu/hr/hr\\_services/forms/ProvPdReview.doc](http://www.cmu.edu/hr/hr_services/forms/ProvPdReview.doc)

**Contact your HR Manager well before the end of the 6-month provisional period, if performance is not satisfactory.**

## Pre-Employment

- \_\_\_ Coordinate publicity
- \_\_\_ Plan welcoming activity
- \_\_\_ Coordinate workspace
- \_\_\_ Order supplies (business cards, name plate, etc.)
- \_\_\_ Request e-mail account
- \_\_\_ Arrange voice mail access
- \_\_\_ Prepare first day job assignment
- \_\_\_ Obtain relocation information
- \_\_\_ Enter the appointment data into HREM

**During the first three months of employment, the new employee's hiring supervisor and/or designated representative should cover the following items:**

## First Day Welcome

- \_\_\_ Introduction to work group
- \_\_\_ Tour of department
- \_\_\_ Present initial job assignment
- \_\_\_ Invite to lunch
- \_\_\_ End of day recap meeting with supervisor

### **Introduction to the Organization**

- History
- Culture
- Mission, values and philosophy
- Strategic plans, goals and objectives
- Literature/Video
- Tour of campus
- Staff directory
- Role of HR Manager
- Introduction/identification of key university people

### **Introduction to the Department**

- Purpose
- Relation to other departments
- Organization of department
- Department's strategic plan
- Department standards
- Department committees
- Procedures
- Security access, rules and keys
- Supplies
- Calendars/schedules
- Standard meetings
- Web site/internet resources
- Introduction to mentor, coach or buddy

### **Introduction to the Position**

- Equipment
- Phone number
- Copier
- Mail
- Fax machine
- Position description
- Performance expectations/goals
- Safety/emergency procedures
- Work hours, breaks, mealtimes and other rules

### **Training**

- Computer system
- E-mail
- Voice mail
- Software applications
- Telephone system
- Department-specific training
- Learning & Development/Computer Education courses
- Contact EH&S for training of lab or art studio workers

### **General**

- Employee Orientation (see <http://www.cmu.edu/hr>)
- Attendance Expectations and Illness reporting
- PTO request practices
- Smoking policy
- Payroll timing, policies and procedures
- Parking
- ID card
- Credit card
- Expense reporting
- Bulletin boards and newsletters
- Places to eat

### **New Employee Paperwork**

- W-4 and state tax forms, I-9 documents
- Staff or Faculty Handbook URLs
- Intellectual Property Form
- Health, Life & Disability insurance, Retirement enrollment forms

### **Benefits and Compensation**

- Health, life, disability insurance
- Retirement benefits
- LifeWorks Employee Assistance Program
- Educational/tuition assistance
- Credit union, banking programs
- Employee Assistance Program
- Child Care
- Facilities available for employee use
- PTO, holidays and unpaid leave
- Salary Increase/Performance Review Process

### **Key University Policies**

- Provisional period
- Employee handbook
- Intellectual Property
- Workplace Violence
- Policy on Deadly Weapons
- Confidentiality
- Progressive Discipline
- Partnering for Performance
- Conflict of Interest
- Safety Training/Accident Procedures
- Use of equipment for personal use
- Sexual Harassment (include Computer-Based Training from <http://www.cmu.edu/hr>)