Indiana University South Bend
New Staff Employee Checklist

The welcome and orientation to your department will leave lasting impressions on new employees. The following checklist contains items that are a prerequisite to a positive start. The manager should sign and return this form to Human Resources to include in employees’ personnel file.

BEFORE THE EMPLOYEE BEGINS WORK

___ 1. Confirm the starting date.
___ 2. Schedule a brief period for an uninterrupted talk at the beginning of the first day.
___ 3. Prepare the work area including:
   ___ a. Desk
   ___ b. Needed supplies
___ 4. Prepare the training schedule in detail for the first several days.
___ 5. Prepare the working schedule in detail for the first several days.
___ 6. Prepare the initial paperwork. All bi-weekly, professional staff, and hourly information must go directly to human resources.*
   ___ a. eDoc cover sheet
   ___ b. Emergency Form
   ___ c. Professional Profile Form (ED)  ___ d. Personal Profile Forms (PS & PSA)  *Tax Withholding and Direct Deposit Forms are now completed online.

AFTER THE EMPLOYEE BEGINS WORK

___ 1. Extend a friendly welcome. Answer any of the new employee’s initial questions
___ 2. Indicate the location of restrooms, bulletin boards, payroll, human resources, etc.
___ 3. Discuss departmental rules governing lunch periods, breaks, etc.
___ 4. Introduce the new employee to other members of the work unit
___ 5. Introduce the new employee to divisional management (when available)
___ 6. Give the new employee an organizational chart explaining:
   ___ a. The major functions performed
   ___ b. The importance of the particular position to the operation
___ 7. Provide the employee with a copy of the PDQ explaining:
   ___ a. The duties of the position.
   ___ b. The performance expectations of the position.
   ___ c. Have employee sign the PDQ. Give copy to employee, return original signed copy to Human Resources. Maintain copy in department personnel file.
___ 8. Inform employee that they can access the Staff Policy Handbook at http://www.indiana.edu/~uhrs/policies/index.htm
___ 9. Assign a peer buddy if applicable or someone to take the new employee to lunch
___ 10. Provide training in use of the telephone and voice mail systems
___ 11. Assist the new employee in obtaining an email and network account (and OTP Token if applicable)
___ 12. Explain to the new employee how the network functions (i.e. applicable databases from OneStart, shared drives, copy machine codes)
___ 13. Explain how the new employee can obtain a parking permit and designate parking areas
___ 14. Explain how to clock in for bi-weekly/ePTO from OneStart
___ 15. Explain pay periods and pay checks
___ 16. Arrange an appointment with Human Resources to enroll in benefit plans (x4358) if needed
___ 17. Sign up for the next new employee orientation session (x4850)
___ 18. Obtain an office key for the new employee from Facilities Management (x4386)
___ 19. Take the employee on a tour of the campus and/or provide a campus map
___ 20. Recommend an employee photo ID. This can be obtained from Student Services (x4273)

FOLLOW-UP

___ 1. Meet briefly with the new employee at the end of the first day
___ 2. Meet briefly with the new employee at the start of each day during the first week
___ 3. Continue to follow-up with the new employee on a periodic and consistent basis
___ 4. Follow-up as necessary to assure good adjustment to the job and IU South Bend