**NEW HIRE CHECKLIST**University of California, Santa Barbara-Human Resources

**Employee Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date of Hire: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Prior to First Day**

* Department (or HR, if position was recruited through OACIS) orders a complimentary parking permit for employee’s first day on campus or directs employee to Transportation & Parking Services ([http://www.tps.ucsb.edu](http://www.tps.ucsb.edu/)) prior to reporting on the first day to get a daily permit. The employee will need to complete the hiring paperwork before s/he can apply for a long-term permit.
* Advise employee to 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 - <http://www.bfs.ucsb.edu/payroll/forms>
* Direct Deposit Form - <http://www.bfs.ucsb.edu/payroll/forms>
* 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) - hhttp://www.hr.ucsb.edu/sites/www.hr.ucsb.edu/files/forms/Vol\_Self-ID\_Disability\_form.pdf
* Provide employee with Time of Hire Pamphlet-www.ehs.ucsb.edu/files/docs/wc/FactsAboutWorkers'Compensation.pdf
* Provide employee with Job Description. Review the job description and have employee sign the job description.
* If applicable to your department, give the employee a Compensatory Time Election Form (non-exempt) - <http://www.hr.ucsb.edu/compensation/forms>
* 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 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 – <http://ehs.ucsb.edu/training/srr.html>
* 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 <http://www.hr.ucsb.edu/training/new-employee-orientation>
* 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).