ORIENTATION CHECKLIST
FOR SUPERVISORS TO PREPARE FOR NEW EMPLOYEES

Prior to the first day:

Prepare EPS, ASAP. (The sooner this gets submitted, the smoother this process will go. Almost all employee access centers on EPS entry. You can never submit EPS too early.)

_____ Inform departmental staff of new hire: name, title, and job responsibilities
_____ Identify a mentor who will meet new employee and give tour
_____ Arrange for first-day lunch
_____ Send out welcome letter which outlines first day and introduces mentor
_____ Identify what computer access the employee will need (i.e., Banner, XTender, computer drives, Microsoft Exchange server, etc.) to inform AdIT
_____ If a printer needs to be purchased, purchase one through Bookstore
_____ Appoint an experienced employee for computer training assistance
_____ Prepare workstation:
  • equipment
  • supplies/forms
  • list of computer access
_____ Contact Public Safety for key requests
_____ Contact Telecom for phone access
_____ Prepare written job training schedule:
  • skills/job tasks/job description
  • training time frames and resources

On first day:

_____ Introduce employee to staff and give tour of office
_____ Show employee where his/her desk is and how to order supplies if needed
_____ Explain department responsibilities
_____ Discuss job details/job description and probationary period
_____ Discuss the training/orientation schedule
_____ Explain the work schedule:
  • lunch, breaks
  • department coverage needs
_____ Make an appointment with Human Resources for benefits appointment (if not already completed)
_____ Mentor will bring employee to:
  • Human Resources for computer access and authorization if laptop is needed
  • Public Safety for a parking pass
  • University Center for NMU I.D. and to Help Desk in LRC to pick up laptop, if applicable
_____ Time & Attendance/Leave Request System
  • Proper clocking in/out on computer (Ultratime/Timesheet)
  • Time off (holidays, vacations, illnesses) - proper completion of leave request forms
  • Overtime
_____ Explain use of equipment:
- telephones/fax including code and instructions for long distance calls
- special equipment
- supplies/forms
- mail

_____ Assign initial work items

By end of first week, discuss:

_____ Mentor gives tour of campus/offices and makes introductions, i.e.,
- PEIF – membership
- LRC – library
- UC – bookstore, Wildcat Den
- Other pertinent departments employee will be in contact with

_____ Explain phone directory

_____ Explain listing of NMU acronyms

Computer issues:
- Helpdesk:
  - Can assist with Outlook Training
  - Can assist with Microsoft Exchange
  - Networked printer – Helpdesk can call MicroRepair to set up
- Microrepair:
  - Can order a docking system for laptops
- Bookstore:
  - Can order a printer

_____ Explain organizational hierarchy

_____ Performance appraisal process
- job performance expectations and evaluation
- evaluation format/topics

_____ Absences: who should they notify and by when?

_____ Progress to date; employee’s questions/obstacles

_____ Professional Development
- discuss funds available to employee for current fiscal year

By end of second week, discuss:

_____ Progress to date

_____ Brief review of all first-day and first-week discussion items

_____ Safety/Security
- Public Safety website with training videos (i.e., Active Shooter, MSDS)
- Secure valuables (purse, keys, laptop, etc.)
- On the job injuries

_____ Purchasing policies
- Get company credit card from Purchasing, if necessary
- Concur overview
In the months ahead, pay special attention to:

_____ Follow up with employee regarding workstation/area and if any changes are necessary.

_____ Probationary period, and preparing for an appraisal of the employee’s work during his/her probationary period.

Other considerations to help employee feel welcome:

- A welcome card and/or plant
- Call prior to first day to see if they have any questions and to let him/her know you are excited for their arrival
- Have Welcome (name) to NMU on department bulletin board…
- Offer a department wide luncheon to get to know one another (team building)
- Allow each staff member to bring the new employee to lunch to explain their job duties and also to get know each other on a personal level (team building)