New Employee Orientation Checklist
**Supervisor Responsibilities**

This is a work-in-progress and we are always striving to make this better; please suggest changes and clarifications for improvement to Celia.Rainville@uvm.edu. Updated October 2019

Resources:

[**http://www.uvm.edu/hrs/?Page=managers/managers.html**](http://www.uvm.edu/hrs/?Page=managers/managers.html)

| To help supervisors with the onboarding of new employees: | Who can help you understand or explain this task: |
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| Preparing Your Unit |  |
| Submit request to purchase computer (process asap, minimum of two weeks; the chart string that the computer will be charged to is required in the request) | Extension: Wes ParoAcademic Departments: Business Support Generalist |
| Schedule appointments for key introductions (Dean <contact Diane Trono>, Director <contact Cindy Corkins>, Associate Director, etc.) | HR Team (Mary Dunne, Emily Taylor, or Celia Rainville) |
| Communicate with the Administrative Coordinator (Lisa McCrae) in Extension or for the academic departments, the Administrative Assistant, if you anticipate the new employee to need administrative assistance | Lisa McCrae or the Administrative Assistant in your academic department |
| Schedule departmental lab safety and hazardous materials safety training if necessary |  |
| Coordinate departmental network login and computer services | ETS |
| Verify that an [e-mail account](http://www.uvm.edu/cit/email/) has been created via completion of the Human Resources paperwork | [**UVM Web Directory**](https://www.uvm.edu/directory/)HR Team (Mary Dunne, Emily Taylor, or Celia Rainville) |
| Add employee to appropriate e-mail listserv | Listserv Administrator |
| Provide “SPA News” Listserv Information [SPA website](http://www.uvm.edu/spa/) | UVM SPA website |
| HR Assistants will add the new employee to Extension “Glance Sheets” | Mary Dunne, Emily Taylor |
| Extension Media Team will add the new employee to Extension web site (send e-mail to uvmextension@uvm.edu) or Rachel Leslie for the CALS website | Cathy YandowRachel Leslie |
| Order or print business cards | Amy Walker |
| Order name tag | Local Administrative Assistant |
| Prepare office space (i.e., order and/or organize office furniture, clean out clutter from previous occupant) | Supervisor |
| Order and organize office supplies (writing utensils, post-it notes, etc.)  | Local Administrative Assistant |
| Order and organize personal protective equipment if necessary | Local Administrative Assistant |
| Order and organize tools if necessary | Local Administrative Assistant |
| Send e-mail to Business Support Generalist listing default chart string for travel forms | Business Support Generalist |
| Order keys for office (exterior and/or interior) | Local Administrative Assistant or Office Manager |
| Setup phone | Administrative Assistant |
| Introduce employee to office staff – REMEMBER to send out an Extension-wide e-mail introducing your new employee, including e-mail address, telephone number, and location/address |  |
| Create a list of additional UVM employees to meet across unit and campus (include the Administrative Assistant) |  |
| Ask the new employee to [activate/set up their Net ID](https://www.uvm.edu/account/) |  |
| Schedule a lunch with the employee  |  |
| Give an overview of unit, department, division | Department Chair or Director |
| Review [Extension field offices](http://www.uvm.edu/extension/?Page=offices.html) and [CALS Academic Departments](https://www.uvm.edu/cals/departments_and_programs) | CALS and Extension websites |
| Explain meeting structures and local office customs (e.g., breaks)  | Local staff and faculty |
| Explain faculty/staff unit meetings and assure that they are in the Outlook Calendar schedule | Unit Administrative Assistant |
| Explain unit communications, e.g. existing blogs, SharePoint sites | Cathy Yandow or Rachel Leslie |
| Review [UVM Extension](http://www.uvm.edu/extension/) and [CALS](https://www.uvm.edu/cals) web sites | Cathy Yandow or Rachel Leslie |
| Review [UVM Policies](http://www.uvm.edu/~uvmppg/ppg/?Page=alphalist.php) website | HR Team (Mary Dunne, Emily Taylor, or Celia Rainville) |
| Hand out CALS’ unit organizational chart and [UVM Organizational Chart](http://www.uvm.edu/~isis/org.html)  | Mary Dunne, Emily Taylor |
| Provide the UVM Extension Glance Sheet to the new employee | Mary Dunne, Emily Taylor, Local Administrative Assistant |
| Review [UVM Map](http://www.uvm.edu/map/)  |  |
| Inform the individual of the office emergency plan. | Office Manager or Local Administrative Assistant |
| When asked to testify before Legislative committees or legislature, notify state office prior to testifying | Chuck Ross |
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| Position and Performance Information  |  |
| Review position description and University [career/pay system](http://www.uvm.edu/hrs/?Page=info/classcomp.html&SM=info/infomenu.html) (for staff) | HR Team (Mary Dunne, Emily Taylor, or Celia Rainville) |
| Work schedule – 1.0 FTE = 37.5 hours week. If less than 1.0 FTE, clarify the hours of work, what they receive for holiday time (including cultural holiday) at the reduced rate. | Celia Rainville |
| Review leave time and how to process and request – vacation, personal, medical, FMLA, report of injury, leave of absence, recording in PeopleSoft, Human Resources. Review balances in PS. Refer to [UVM Staff Handbook](http://www.uvm.edu/hrs/?Page=info/staffhandbook/staffhandbook.html) and Extension Policy & Procedure Guide. | Celia Rainville |
| Review UVM holiday schedule | HR Team (Mary Dunne, Emily Taylor, or Celia Rainville) |
| Review goals, objectives, performance measures and performance assessment process | Celia Rainville (staff)Department Chair (faculty) |
| Review ALBERT reporting and other reporting requirements | Stephanie Albaugh |
| Explain available training and resources, see [HR Services training](http://www.uvm.edu/develop)  |  |
| Explain probation procedures and status | [**Probation Policy**](http://www.uvm.edu/hrs/info/staffhandbook/conditions.pdf),HR Team (Mary Dunne, Emily Taylor, or Celia Rainville) |
| Schedule an every-month formal check in prior to probation ending then quarterly FORMAL check-in | HR Team (Mary Dunne, Emily Taylor, or Celia Rainville) |
| Planning and goal-setting procedures | Celia Rainville |
| Create list of first work assignments | Celia Rainville |
| Encourage your new employee to get involved at UVM (committees, support groups, events, etc.), [Staff Council](http://www.uvm.edu/~stffcncl/) or United Academics |  |
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| Unit Policies and Procedures  |  |
| Review [Extension policy guidelines](http://www.uvm.edu/extension/?Page=internal/content/operations.html) or [CALS Academic policy guidelines](https://www.uvm.edu/cals/student-services) | Celia Rainville |
| Explain office hours (8-4:30) and alternative work schedules | Celia Rainville |
| Explain [payroll](http://www.uvm.edu/~cntrllrs/?page=payroll/schedules.html&SM=payrollmenu.html)  | Mary Dunne, Emily Taylor |
| Explain how to request and submit leave time | Celia Rainville |
| Explain notification when [sick and other leaves/absences](http://www.uvm.edu/hrs/?Page=info/staffhandbook/staffhandbook.html).Explain accrual. | UVM Guide, Celia Rainville |
| Review confidentiality |  |
| Review security issues, including locking files, cabinets, office (doors and windows) and building | Local Administrative Assistant |
| Review emergency procedures and phone numbers, explain inclement weather and office closing policies | Administrative Assistant |
| No-smoking policy, [Smoking](https://www.uvm.edu/policies/general_html/smoking.pdf) | UVM Policy Guide |
| [Travel policies, procedures](http://www.uvm.edu/~uvmppg/ppg/travel/travel.pdf) (ask new employee to provide the round-trip mileage for their commute from home to work). | Business Support Generalist |
| Explain how to manage media, communications and public relations; Lisa Halvorsen; [University Communications](http://www.uvm.edu/news/) | Cathy Yandow or Rachel Leslie |
| [University Policies, Procedures and Guidelines](http://www.uvm.edu/~uvmppg/ppg/) | Celia Rainville |
| Marketing template use | Cathy Yandow or Rachel Leslie |
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| General Training  |  |
| Outlook Calendar use (office and web) [Software](http://www.uvm.edu/cit/calendar/) | ETS |
| E-mail use (office and web) [Software](http://www.uvm.edu/cit/email/), [Help](http://www.uvm.edu/cit/help/) | ETS |
| Telephone use | Local Administrative Assistant |
| Review emergency procedures (where to meet; fire extinguisher locations; emergency numbers) | Local Administrative Assistant |
| Introduce the new employee to the administrative assistant that will assist you (see section titled “Preparing Your Unit”) | Lisa McCrae, Celia Rainville |
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| Position Specific Training  |  |
| Computer software, see software link under General Training | ETS |
| Join [UVM listservs](http://www.uvm.edu/ets/mailinglists/).  | List serve owners |
| Will the employee drive a university vehicle? Verify driving record; Make sure employee takes driver [safety course](http://www.uvm.edu/~riskmgmt/?Page=driver_train/index.html) |  |
| Other computer and information technology training  | ETS/Lynda.com/Professional Development & Training |
| Purchasing and Accounts Payable procedures  | Local Business Support Generalist |
| Budget procedures, chart strings, if applicable | Business Support Generalist |
| Payroll issues  | Celia Rainville |
| Management issues | Celia Rainville |
| [Preventing Sexual Harassment Training](https://www.uvm.edu/it/kb/article/harassment-and-discrimination-prevention-training) through UVM Learning Services |  |
| Review First Report of Injury Form (must be submitted within 72 hours of injury) | HR Team (Mary Dunne, Emily Taylor, or Celia Rainville) |
| Chart string changes for purcards, expense forms, salaried employees, and temp employees. Update at change of fiscal year and/or grant. | Business Support Generalist or HR Team (Mary Dunne, Emily Taylor, or Celia Rainville) |
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| Office Support Information  |  |
| [Print and Mail Center](http://www.uvm.edu/~pmc/) services, explain [campus/local mail delivery if applicable] US Mail, and overnight delivery services/procedures  | Local Administrative Assistant |
| Kitchen, break area/times | Local Administrative Assistant |
| Recycle bins | Local Administrative Assistant |
| Supplies and ordering supplies | Local Administrative Assistant |
| Fax use | Local Administrative Assistant |
| Copier use and Codes | Local Administrative Assistant |
| Repair/Maintenance of office space | Local Administrative Assistant |
| Diversity, Equity, and Inclusion Information  |  |
| Inform new employee of Extension and CALS DEI/EDI committees | [Extension DEI Committee](https://www.uvm.edu/extension/sustainableagriculture/uvm-extension-diversity-equity-inclusion-resources-events-committee), [CALS EDI Committee](https://www.uvm.edu/cals/cals-equity-diversity-and-inclusion-committee) |
| Review DEI educational offerings with new employee | [UVM Professional Development DEI](https://www.uvm.edu/develop/diversity-equity-inclusion), [Extension DEI Committee](https://www.uvm.edu/extension/sustainableagriculture/uvm-extension-diversity-equity-inclusion-resources-events-committee) |