**SUPERVISOR ORIENTATION CHECKLIST FOR THE NEW PERMANENT EMPLOYEE**

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| EMPLOYEE NAME: |  | PID NUMBER:  |  |

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|  | BEFORE THE EMPLOYEE BEGINS WORK |
|[ ]  Notify everyone in your unit that a new person is starting and what the person’s job will be. Ask staff members to welcome the new employee and engage their support. If possible, identify a staff member to act as a work partner for the first week |
|[ ]  Order business cards and name plate |
|[ ]  Set-up employee’s mailbox |
|[ ]  Order supplies/assign equipment |
|[ ]  Obtain the employee’s ONYEN and UNC email address |
|[ ]  Complete and submit any applicable systems access request forms |
|[ ]  Complete the required [User Access Form](https://faopharmacy.unc.edu/it/forms/user-access-form/) with IT to get the employee set up with network access, computer equipment, printers, etc. |
|[ ]  Add employee to relevant listservs |
|[ ]  Send a welcome email to the new employee with schedule for the first week, dress code, time/place to report to on their first day, and any other onboarding information specific to your work unit |
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|  | THE FIRST DAY |
|[ ]  Confirm that the employee attended the UNC-wide new employee orientation session (attendance is required prior to beginning work) |
|[ ]  Give a warm welcome and discuss the plan for the first day |
|[ ]  Tour the employee’s assigned work space, the immediate work area and the building. Explain where rest rooms, refreshments and break areas are located |
|[ ]  Provide keys and other required equipment |
|[ ]  Introduce the new employee to other staff members |
|[ ]  Introduce the new employee to the assigned work partner (if appropriate) |
|[ ]  Set up a brief meeting with the employee and the work partner to review the first week’s activities |
|[ ]  Review your office’s policies and procedures including: work schedule, telephone, e-mail, Internet, copy machine and fax use, office organization (files, supplies, etc), mail drop and campus mail services, dress code, process for requesting time off, after-hours and weekend office access, probationary period, staff meetings, office/lab safety protocols, emergency procedures and emergency contacts, AlertCarolina program, customer service philosophy, confidentiality, ethics, code of conduct, other policies and procedures as applicable |
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|  | THE FIRST WEEK |
|[ ]  Announce the employee to the division/school by email – role, bio and contact information |
|[ ]  Review the employee’s work area to ensure needed equipment is in place. Order office supplies for the employee (calendar, preferred work tools, etc.). Provide PCard (if applicable) |
|[ ]  Arrange for yourself or a work partner to have coffee/lunch with the employee (if appropriate) |
|[ ]  Provide an overview of the functional area/work unit. Describe how the job fits into the department. Review the organizational chart and explain its relationship to other work units in the School and campus |
|[ ]  Ensure the employee completed the required trainings |
|[ ]  Confirm that employee’s name, title and campus address is displayed correctly in the campus directory |
|[ ]  Review computer competency: assess knowledge of and comfort with department’s hardware and software. Hardware: turning off, backing up, printing, shutting down, etc. Software: Word, Excel, Outlook or other programs needed by the position. File servers, e-mail, Internet, records retention. Arrange further training and support as needed. |
|[ ]  If your employee needs access to Marsico Hall or Genetic Medicine Building, submit their Photo ID Badge request form to the UNC School of Medicine ID office.  |
|  | THE FIRST MONTH |
|[ ]  Meet with the employee to discuss performance expectations: Review job description, obtain signature, and give one copy to the employee. discuss work rules, complete a performance plan (if applicable), explain the performance management cycle and key dates |
|[ ]  Check that the employee has signed up for benefits prior to enrollment deadline |
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|  | THE FIRST THREE MONTHS |
|[ ]  Revisit performance standards and work rules |
|[ ]  Complete the initial Employee Competency Assessment (permanent SHRA employees) |
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