

# Hiring Manager Checklist

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## Pre-Boarding

### Logistics

- ☐ Submit the [Onboarding Services](#) form in Service Now to begin the IT provisioning process for your new employee. The submission of this form will initiate the request for the new hire's computer, phone and building access
- ☐ Complete the [New Hire Space Assignment Form](#) for the [Building & Administrative Service Center](#) (BASC) to prepare the workspace.
- ☐ Ensure that you are aware of the details of your new employee's Payroll and Badging appointments
- ☐ Ensure office/cubicle is equipped with standard workstation equipment and emergency kit
- ☐ Review the [On-Boarding & Welcome webpage](#) on the UCOP HR website
- ☐ Complete a 15-minute webinar, [UC Strategic Onboarding](#), which is available in the UC Learning Center

### Preparing to Welcome the New Employee

- ☐ Send welcome email congratulating the new employee and providing relevant details for their first day
- ☐ Notify your team of the new employee's scheduled arrival and provide a brief description of their relevant skills/experience
- ☐ Review the [Remote Buddy Guidelines](#) on the On-Boarding & Welcome webpage
- ☐ Identify a buddy for the New Employee and engage with them by sharing the Remote Buddy Guidelines
- ☐ Make arrangements for a brief welcome gathering/reception as appropriate
- ☐ Schedule introductions with key stakeholders
- ☐ Create a training plan for the employee to help them succeed at their job

## First Day

### Greeting Your New Employee

- ☐ Meet new employee in the lobby and discuss [visitor protocol](#)
- ☐ Bring new employee to Payroll and Badge appointments
- ☐ Escort employee to work space, orient to immediate work area including restrooms and break room
- ☐ Arrange for a tour of building/organization and share contact information for the [Building & Administrative Service Center](#) (BASC)

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- ☐ Help employee determine transportation needs (BART or encourage them to connect with BASC for parking options, if needed)
- ☐ Welcome and introduce new employee to fellow team members. Helpful hint: Consider a welcoming activity, treats, plant/gift, etc.
- ☐ Check that employee has computer access and orient to office applications (Slack, Zoom, Box etc.)
- ☐ Connect the employee to their office “Buddy”
- ☐ Follow up with the Buddy to ensure they have met with the new employee
- ☐ Check in at the end of the day

## Technology Overview and Resources

- ☐ Review the Departmental website and directory of drives and department/team specific drives
- ☐ Review [UCOP website](#)
- ☐ Ensure employee has access to all department applications
- ☐ Provide an overview of department equipment, applications, and systems
- ☐ Direct employee to the [Ergonomics Program webpage](#) for ergonomics training and self-assessment. Encourage the employee to reach out to the [Ergonomics Program](#) for assistance.
- ☐ Ensure registration in [New Employee Orientation, Benefits Orientation \(webinar\) and IT Orientation](#)

## Standard Operating Procedures

- ☐ Review anchor days, work schedule and departmental work arrangements. Include break schedule if non-exempt.
- ☐ Review TRS timesheet - absence requests/reporting, and overtime (if non-exempt)
- ☐ Review the [FlexWork](#) program
- ☐ Review [Mission, Vision](#) Statement & [Principles of Community](#) and how the team and employee goals align with those
- ☐ Discuss professional standards, office etiquette, ethics, and general UCOP culture

## Role Specific Information

- ☐ Discuss employee's job role and responsibilities
- ☐ Ensure employee has a copy of their Job Description
- ☐ Review employee's training plan – include mandatory and on-the-job training and how to request training
- ☐ Introduce them to the UC [Learning Center](#)

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## First Week

### Getting Started with the New Employee

- ☐ Review their schedule for the first week
- ☐ Clarify expectations and job responsibilities
- ☐ Explain where to find and/or how to order office supplies to help set up personal workspace
- ☐ Encourage any questions about policies and procedures
- ☐ Explain how to access [technical support](#). Provide helpdesk contacts: Email - [Servicedesk@ucop.edu](mailto:Servicedesk@ucop.edu); Phone – 510 987 0457
- ☐ Discuss emergency preparedness, including location of first aid kit

### Start Exploring

- ☐ Check on the transition to the new role and any training needs
- ☐ Review performance expectations and share the [STEP Performance Management process](#)
- ☐ Provide details of any [award or recognition programs](#)
- ☐ Review parameters related to the employees' [probationary period](#)
- ☐ Review any other relevant policies and procedures from [Manager Resources webpage](#) of UCOP HR and [Personnel Policies for Staff Members \(PPSM\)](#)
- ☐ Review Organizational Structure (e.g., strategic plan, goals, organization chart, key stakeholders, reporting relationships: Department and Division)

### Socialization & Work Environment

- ☐ Encourage having lunch/coffee with a coworker
- ☐ Review workplace safety (include emergency, basic first aid, injury reporting, workers compensation, evacuation route)
- ☐ Hold a “Check-In” meeting with employee at the end of the week to discuss progress and address questions
- ☐ Schedule regular one-on-one meetings to provide performance feedback, address questions, and ensure continued building of knowledge

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## Within 90 days (recommended)

### Review and clarify performance objectives and expectations

- ☐ Employee should understand role and responsibilities; ensure development of team and business relationships
- ☐ Ensure timely opportunities for feedback and development

### Continue to monitor performance and provide feedback

- ☐ Maintain regular one-on-one meetings to provide performance feedback, address questions, and ensure continued building of knowledge
- ☐ Provide increasingly challenging projects as appropriate so employee can develop skills and you can assess employee's skills
- ☐ Continue to identify milestones, completion dates, and success measures
- ☐ Acknowledge and recognize accomplishments and milestones

### Support and Resources

- ☐ Assure employee has needed support and resources
- ☐ Provide training, as needed, to help employee understand internal systems and operating practices and obtain information and skills required for job performance
- ☐ At the end of a six-month probationary period, conduct final probation review with employee making sure that you ask employee for feedback.
- ☐ Congratulate employee on passing probation