This checklist serves as a guide for managers and new staff. Follow the steps over the next four months to help your new staff member acclimate to AU and become productive in his/her role more quickly.

PRIOR TO THE FIRST DAY OF WORK

☐ Ensure that HR has been notified of your new hire and that HR creates an offer letter (in consultation with HR representative)

☐ Send a personal note of welcome

☐ Prepare written job training schedule

☐ Appoint experienced employee for training assistance

☐ Arrange for first-day lunch

☐ Be prepared to inform OIT of your technology needs, including hardware, software and other special IT access

☐ Identify access needs:
  - o Keys
  - o Card Access

☐ Prepare workstation/office:
  - o Furniture
  - o Equipment
  - o Supplies/Forms
  - o Long distance calling card

FIRST DAY OF WORK

☐ Introduce employee to staff and tour work area

☐ Place a welcome note at workstation

☐ Assist employee in creating a myAU account at myau.american.edu (if first day of work is not Staff Orientation)

☐ Review training schedule:
  - o New Hire Orientation/OIT Training
  - o Colleague and/or other systems training
  - o Performance Management Program Training
  - o Performance Management Program Training for New Managers (if applicable)
  - o Preventing Harassment, Promoting Respect
  - o Service Plus (Finance division)
  - o Employment Policies: What Every Manager Needs to Know (if applicable)
  - o People Management Basics (if applicable)

☐ Discuss department responsibilities and expectations

☐ Dress code
ORIENTATION CHECKLIST

FIRST DAY OF WORK

☐ Provide realistic overview about AU’s culture and the department culture

☐ Discuss job details/job description

☐ Discuss work schedule
  o Lunch breaks
  o Department coverage needs

☐ Discuss absences: How and when to notify supervisor
  o Provide phone numbers

☐ Discuss timesheets/leave reports
  o Proper completion and deadlines
  o Time off (holidays, vacations, illness)
  o Overtime rules

☐ Explain use of equipment
  o Telephones, long distance phone cards
  o Special equipment (computer, copier, etc.)
  o Supplies/Forms

☐ Assign initial work items

☐ Discuss first day lunch

BY END OF FIRST WEEK

☐ Provide the employee with meaningful work

☐ Discuss progress to date: employee’s questions/obstacles

☐ Discuss job training schedule adjustments, if needed

☐ Review organization chart; different department functions
  o Role of other departments at AU
  o How department integrates with the rest of AU
  o General operating procedures

☐ Discuss safety training
  o Discuss policy/codes of safe practice
  o Employee safety suggestion format

☐ Discuss Performance Management Program process
  o Performance expectations
  o A successfulU system
  o Scheduling of training

☐ Discuss pay administration practices
## ORIENTATION CHECKLIST

**BY END OF SECOND WEEK**

- [ ] Discuss progress to date
- [ ] Provide brief review of all first-day and first-week discussion items: Any questions?
- [ ] Gather feedback about the orientation process and share with HR
- [ ] Complete initial goals in ASuccessfulU

**BY END OF 1-4 MONTHS**

- [ ] Introduce employee to key staff from other departments
- [ ] Provide regular performance feedback and check ins
- [ ] Provide additional training if needed