

## ORIENTATION CHECKLIST

Employee's Name: \_\_\_\_\_ Employee #: \_\_\_\_\_  
(Please Print)

Department: \_\_\_\_\_

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To be used by the Supervisor when the new employee first reports for duty. The form must be completed and submitted to Human Resources with the new-hire PAF.

- 1. Welcome the new employee. Find out if they prefer a "nickname," and how he/she wishes to have it pronounced.
- 2. Ensure that the new employee is scheduled to attend the new employee orientation session.
- 3. Have employee sign the certification form, W-4 slip, retirement form, and loyalty oath. If an orientation kit has not been provided to you with the certification, obtain one from Human Resources and present it to the employee.
- 4. Have employee complete the Immigration and Naturalization Service Form I-9, *Employment Eligibility Verification*. Supervisor should verify and sign form. Attach copies of required documentation with Form I-9.
- 5. Discuss his/her job and point out its importance. If substitute or limited term, explain.
- 6. Tell employee about your department's organizational structure, chain of command, and how the department fits into the overall County operation. Explain consequences if departmental/County standards are not followed properly (refer to Civil Service Rule 14.02).
- 7. Briefly discuss your departmental rules and regulations (including telephone and e-mail usage). Use a positive approach: "We do this" instead of "Don't do that."
- 8. Tell employee about their duty hours, lunch hour and coffee breaks. Show employee the rest room, staff area, lunch room, and where to hang his/her hat and coat.
- 9. Inform employee of any special clothing or equipment requirements.
- 10. Discuss parking facilities and car pools. When applicable, inform employee about the option of purchasing a "passcard" for the Palm Street Parking Structure.
- 11. Review timekeeping procedures, pay days, step increases, and fringe benefits. If applicable, explain the confidential and management employee benefit package.
- 12. Review the probationary period provisions and performance rating systems, including performance standards. Show them the actual evaluation form to be used.
- 13. Review the Civil Service Rules. Any questions concerning Equal Employment Opportunity should be directed to the Affirmative Action Coordinator in the Administrative Office at 781-5011.

- 14. Give the employee a copy of the San Luis Obispo County Policy Against Discriminatory Harassment. Explain that the County is committed to providing employees a work environment free of unlawful discrimination. Schedule the employee for mandatory training on Preventing Discriminatory Harassment. Explain applicable health and safety procedures including the County's Workplace Violence Policy, and use of safety equipment as listed in Safety Orientation Checklist and County Injury Prevention Program (IPP).
- 15. Review vacation, sick leave, leave of absence and family leave policies; explain your department's procedures for requesting and approving such leaves.
- 16. Explain to employee that he/she must sign up for medical, dental and vision insurance (new employees are **not** automatically enrolled).
- 17. If applicable, explain to contract, temporary help, student interns, vocational rehabilitation trainees, and W.I.N. employees that they are not in the classified service, do not accrue seniority, and are not eligible for promotional examinations.
- 18. Tell employee your plans for his/her training, and introduce employee to his/her training "sponsor."
- 19. Show employee his/her place of work and introduce employee to his/her fellow workers.
- 20. Ask if he/she has any questions and answer them fully.
- 21. If applicable, have employee complete an "Assuming Office Statement of Economic Interest" (Form 700) available from the Clerk-Recorder's Office.
- 22. For employees who will be driving County vehicles, have him/her complete an "Authorized County Driver" form.

**Follow up!!! See that his/her training is coming along well!!!**

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As soon as all of the items have been covered, the employee and supervisor should sign the form. It is mandatory that this form be returned to Human Resources for inclusion in the employee's personnel file.

Employee's signature: \_\_\_\_\_

Date: \_\_\_\_\_

Supervisor's signature: \_\_\_\_\_

Date: \_\_\_\_\_