New Hire Departmental Checklist

Employee name: ____________________________ Date of Hire/Re-Hire: ______________________

Check one that applies:

- Admin
- Faculty
- Staff
- OPS

Department: ____________________________

Supervisor: ____________________________

DEPARTMENT CHECKLIST FOR HUMAN RESOURCES

Departmental List (check when completed)

- Background Check
- Prepare Letter of Offer
- Send Letter of Offer to New Hire—date __________
- ASF signed by all parties

Send the following documents to HR Manager:

- Signed Letter of Offer
- ASF (if rehire)
- Copy of Resume (if available)
- Original Transcripts (Admin only)
- Coordinate New Hire/Payroll Sign-Up with HR
- New employee ID received from HR: __________

WORK SPACE PREPARATION

Phone:

- Phone Set-up Requested
- New Setup
- Old # Reset: _________________________
- XVM Jack # _________________________
- International Long Distance Code Requested (if applicable)

Computer Set-Up

- New Computer Ordered (FAST- PO #___________)
- Profile Configuration (new computer)
- Profile Reconfiguration on existing CPU (NEO)
- Copy/Print Code Requested
- Printer Set-Up Requested—must have copy code first

Building Access

- Move/Add/Change Request
- Building Access Card Requested
- Keys for Office
- Name Badge (purchase with p-card)
- Office Sign

Supplies/Communications

- Business Cards Ordered (if applicable)
- Email New Hire Announcement to Department/Campus Newsletter
- Update Departmental Lists
- Emergency Contacts
- Other __________________________

SUPERVISOR’S CHECKLIST

Before 1st Day:

- Print copy of Job Description
- Prepare “Day in a Life” to acquaint new hire with daily duties
- Review calendar to schedule appropriate meetings during new hire’s first month (staff meetings, etc)

First Day/Week:

- Give copy of Job Description and “Day in a Life”
- Review organizational structure of department w/new hire.
- Review department’s mission & strategic plan.
- Review job functions, competencies & expectations for working in department.
- Review Outlook with new hire (adding appropriate meetings to the calendar)
- Review phone system
- Voicemail set-up
- Transfer calls
- Conference calls

- Discuss department’s policies & procedures
- Attendance & punctuality
- Budget procedures
- Office Supplies
- Communications
- Dress Code
- Safety plan
- Work Schedule
- Mail
- Internet Access
- Phone Access
- Travel
- Timesheets (if applicable)
- Email Regulations (Government in the Sunshine)
- Weather emergencies

- Conduct tour of department & campus
SYSTEMS ACCESS

OUTLOOK:
- User ID request submitted to Campus Computing
- Work Order for User ID

GEMS SELF SERVICE:
- Confirm new hire has been given ID #: __________

Online Tutorials:
- Overview
- Attendance & Leave for Employees & Supervisors
- Request for Training

OASIS/BANNER (if applicable):
- OASIS FERPA Tutorial (online)
- Access form signed and sent
- OASIS Navigation (online)
- Working with Scheduling
- Working with Course Permits
- Working with Course Holds
- Working with Registration

GEMS Professional (if applicable):
- Appointments:
  - GEMS Basics (online)
  - GEMS Appointments

- Attendance & Leave Coordinator
  - GEMS Basics (online)
  - Attendance & Leave Policies & Procedures
  - GEMS ALT Leave Coordinator

- Payroll
  - How to Prepare Payroll (online)
  - How to Certify Payroll (online)
  - GEMS Pay Distribution

- Reports & Queries (online)

- Access form signed and sent

PERT (if applicable):
- PERT Online

Net ID/Blackboard:
- Access Requested
- Reviewed with new hire

e-USF Portal:
- Access reviewed with new hire

I-Synergy (if applicable):
- Access Requested

FAIR (if applicable):
- Access Requested
- Reviewed with new hire

FAST (if applicable):
- Navigation Tutorial
- Access form signed and sent

Purchasing:
- Purchasing Hands-on

P-Card:
- P-Card Overview (online)
- P-Card Reconciliation Workshop
- P-Card Holder Certification

Travel:
- Travel Training
- Travel Approvers Training

Financial Reporting:
- USF Financial Systems Overview
- Making Cents of Accounting
- General Ledger
- USF Finance Mart

Billing:
- Billing & Accounts Receivable

RECOMMENDED TRAINING

Email 101

Supervisors:
- Performance Evaluation Procedures (online)
- Annual Performance Review Workshop