



INDIANA UNIVERSITY

Supervisor's Checklist for Orienting New Employees

Note to Supervisor

This checklist has been designed to assist supervisors as they orient each new employee to the University and the department. It serves as a structure for communicating all relevant University and department-specific policies, administrative procedures, position responsibilities and expectations, and other essential information.

Employee Information

Name: _____ E-mail: _____
 Dept./School: _____ Phone: (____) ____ - ____
 Campus Address: _____
 Supervisor: _____ Date of Hire _____

Introduction to Department/School

Explain:

_____ Department's mission & goals	_____ Department's service philosophy
_____ Department's calendar	_____ Department meetings & events
_____ Department's organizational chart	_____ Role of Department Head
_____ Other: _____	

The Position

Discuss:

_____ Position description/job responsibilities
 _____ Priorities and expectations for successful performance
 _____ Expectations for quality of service delivery
 _____ Role of co-workers/team in context of employee's position (who does what)
 _____ Probationary review schedule (if applicable)
 _____ Performance management process & schedule of reviews
 _____ Other: _____

Compensation

Explain:

_____ Salary rate and grade, pay schedule, check distribution (including direct deposit)
 _____ Salary increases and how they occur
 _____ Bonus awards (if applicable)
 _____ Compensatory time/overtime payment (pre-authorization & departmental preference/process)

Hours of Work

Discuss:

_____ Schedule for position (office hours)
 _____ Procedures for completing and submitting time sheets
 _____ Break periods

Time Away From Work

Explain:

- Vacation time/Paid Time Off
- University holiday schedule
- Sick time
- Leaves without pay

Explain related departmental policies:

- Department policies regarding timing of vacations
- Expectations regarding calling-in in the event of lateness/absence
- Required documentation upon return to work (after illness)
- Taking classes during workday

Department Policies and Administrative Procedures

Review:

- Policies and procedures handbook/web site
 - Building use (access and security)
 - Office keys
 - Bulletin boards
 - Emergency notification
 - On-campus and off-campus addresses
 - Equipment and supplies
 - Telephones (use, voicemail, IU directory, expectations for telephone etiquette & answering calls, etc.)
 - Computing (policies, procedures, access, and training)
 - Signature authority (delegate if appropriate)
 - Other: (Dress Code, etc.)
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University Policies

Review:

- | | |
|--|--|
| <input type="checkbox"/> Cell Phones & other Elect Devices | <input type="checkbox"/> Conflict of Interest/Commitment |
| <input type="checkbox"/> Fiscal Misconduct | <input type="checkbox"/> Fraud |
| <input type="checkbox"/> Allowable Hospitality Expenses | <input type="checkbox"/> Preservation/Destruction of Records |
| <input type="checkbox"/> Inappropriate use of University funds | <input type="checkbox"/> Use of University Vehicles |
| <input type="checkbox"/> Depositing of Funds | <input type="checkbox"/> Internal Controls |

Disclosure: This form is to be used as a guideline. We acknowledge that units could have their own unique procedures and/or additional steps. You may use this form and adapt it as necessary.

Send your comments/suggestions on how to improve this form to cats@indiana.edu.

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