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

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.)

University Policies

*Review:*
- [ ] Cell Phones & other Elect Devices
- [ ] Fiscal Misconduct
- [ ] Allowable Hospitality Expenses
- [ ] Inappropriate use of University funds
- [ ] Depositing of Funds
- [ ] Conflict of Interest/Commitment
- [ ] Fraud
- [ ] Preservation/Destruction of Records
- [ ] Use of University Vehicles
- [ ] 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.

*Updated 1/2019*