

**Madison-Oneida BOCES
Supervisor's Orientation Checklist**

Before the New Employee Arrives:	<p><i>Orientation is an ongoing process that begins at the interview. It is important for the immediate supervisor to maintain contact with the new employee during the time between accepting the offer and the actual starting date. You will create a positive impression and reinforce the employee's decision that he or she made the right choice in accepting the position.</i></p> <p><i>Remember, not all of these items will be appropriate for all new employees.</i></p>
	<ul style="list-style-type: none"> <input type="checkbox"/> Contact the employee via telephone. Welcome him or her to Madison-Oneida BOCES and the division. <input type="checkbox"/> Provide the reporting date, time and place. <input type="checkbox"/> Indicate whom to report to on the first day. <input type="checkbox"/> Confirm office work hours, the position title and salary, and the length of the probationary period, if applicable. <input type="checkbox"/> Provide directions to the work site. Note parking options. <input type="checkbox"/> Indicate the expected office attire. <input type="checkbox"/> Let the employee know about lunch arrangements for the first day. <input type="checkbox"/> Provide employee with the office phone number that has been designated for him/her OR provide the office phone number that employee should give family in order to contact the employee in event of emergency during the first week of work. <input type="checkbox"/> If the employee is relocating, offer available relocation resources or websites. <input type="checkbox"/> Determine the name the employee wants to be called. <input type="checkbox"/> Review what preparation, if any, will be needed prior to the first day. <input type="checkbox"/> Explain what the employee can expect the first few days.
In the Division Before the New Employee Arrives:	<p><i>Planning ahead and investing some time prior to the new employee's start date increases the chances of a smooth transition for the employee and the division.</i></p>
	<ul style="list-style-type: none"> <input type="checkbox"/> Announce to division and other appropriate employees the new employee's name, arrival date, title, and responsibilities. Encourage all co-workers to be welcoming. <input type="checkbox"/> Select an individual from your work group to be available during a new employee's first weeks to answer questions and serve as a mentor to the organization. Mentor: _____ <input type="checkbox"/> Clean the desk/workstation, office, and/or work area. <input type="checkbox"/> Order appropriate office supplies and stock desk. <input type="checkbox"/> Assemble appropriate resources such as telephone directories, computer program manuals,

staff listings, other contacts related to the employee's responsibilities, and student's names if applicable.

- Review technology needs and plan for any technical training that is required.
- Confirm telephone access.
- Assemble new employee orientation packet, which should include at a minimum:
 - Job Description
 - Divisional organization chart
 - Contact persons
 - An entry plan, if appropriate
 - Time sheets/ personnel forms
 - Relevant policies and procedures

Employee's First Day

Making the new employee feel welcome is your division's top priority. By creating a comfortable and effective environment, you can help minimize the anxiety most new employees experience. You'll want to time the giving of information to meet the new employee's needs and to avoid information overload.

On-site employees:

- Give a warm welcome.
- Explain where to put coat and personal belongings.
- Discuss your plan for the day.
- Introduce new employee to other members of immediate staff and other key division/department members.
- Obtain emergency contact and other relevant information from the employee.
- Arrange a tour to include work area, conference rooms, lounge area, vending machines, restrooms, water fountains/coolers, refrigerator or kitchen, mail room, bulletin boards, supply room.
- Make arrangements for you and/or your staff to have lunch with the new employee, either in the office or off-site.
- Assess knowledge of and comfort with technology (voice mail, e-mail, Internet).
- Review fax, e-mail and Internet use policy.
- Review phone number and provide training on use of phone and voice mail.
- Provide overview of security, confidentiality, and business ethics.
- Provide orientation folder as well as general information about division and office policies, procedures, and culture, such as:
 - Employee's work schedule
 - Work hours
 - Attendance and punctuality expectations
 - Call in procedures for requesting sick and personal leave; approval and reporting process
 - Annual leave requests, approval and reporting

- If applicable, overtime possibilities and the OT approval procedures
- Breaks and lunch – where and when
- Any required office coverage
- After-hours and weekend office access
- Issuing required keys
- Evacuation procedures in case of emergency
- No smoking policy
- Availability of refreshments/supplies provided by the office
- End of day routine: lights, telephones, doors, computers, etc.

- Process for sending and receiving outside and courier mail.
- Discuss department culture issues, such as:
 - Service orientation and telephone/visitor techniques and etiquette
 - Confidentiality and work ethics
 - Working with supervisors, colleagues, support staff, students
 - Managing office conflicts

In addition, for off-site employees:

- Ensure that employee secures all security badges from BOCES and the district.
- Ensure that employee gets email access at the district.
- Call the school principal and let them know of the new employee to be working in the school.
- Explain building policies.
- Explain communication protocol.

During the Employee's First Two Weeks

New employees are interested in and need a sense of where they fit within the division and the BOCES organization. They will need information on the objectives, policies, values and plans for the division and the BOCES.

- Provide organizational overview by:
 - Presenting organizational chart
 - Discussing goals and objectives of the division/department
 - Describing main functions of other members of the division
 - Describing place of employee within the division
 -
- Follow up regarding technology access and training needs.
- Give position overview by:
 - Reviewing position description
 - Discussing goals and objectives of the position
 - Determining training and development that is needed within the first 3 months
 - Review the performance appraisal system
 - Explain process and timing of future salary increases
 - Provide and explain timesheets, if applicable
 - Present initial job assignments
- Order business cards if applicable.
- Ensure that employee has secured identification badge.

- Add new employee's name to division and department distribution lists.
- Provide schedule of regular reports, events or activities that employee is responsible for.
- Ask how the week went and discuss any areas of concern.

During the Employee's First Six Months	<i>New employees are highly motivated to do their job and demonstrate their skills, abilities, and value. Give them time to learn the basics of getting things done within the division yet provide consistent feedback on performance and your expectations.</i>
<input type="checkbox"/>	<p>On a bi-weekly basis, at a minimum, meet with the employee to:</p> <ul style="list-style-type: none"> ▪ Discuss issues ▪ Talk about work rules ▪ Review job description, expectations and performance ▪ Complete a 90 day review of performance and status of assignments. ▪ Complete a 180 day review of performance and status of assignments.