

Texas A&M AgriLife Extension Service

Unit Checklist for Orienting & Onboarding New Employees

The following checklist can be used by units to orient and onboard new employees.

- The checklist can be modified to meet the specific needs of a given department. Contact AGHR@ag.tamu.edu to request changes on the web version of the checklist.
- Hiring supervisors, HR Liaisons and others charged with orienting new employees are encouraged to review the checklist prior to meeting with the new employee(s), tailor the checklist to the unique characteristics of the agency/unit, gather forms and other paperwork as applicable, and schedule meetings and events to be attended by the new employee.
- The items marked with an * on the checklist can be gathered and organized in advance of meeting with the new employee(s).

About Our Unit

- A brief history of the Agency/Unit <http://agrilifeextension.tamu.edu/about/who-we-are/>
- Organizational charts <http://agrilifeextension.tamu.edu/wp-content/uploads/2014/07/2014-06-10-tx-extension-organizational-chart.pdf>
- Agency/Unit mission, vision, strategies, core values, goals* <http://agrilifeextension.tamu.edu/wp-content/uploads/2014/07/SSPSummary.pdf>
- Unit website, employee newsletter <http://agrilifeextension.tamu.edu/news/>
- Acronyms & symbols related to our unit [under development]
- The unit's primary customers / unit partners <http://agrilifeextension.tamu.edu/about/partner-extension/>
- The services provided by the Unit <http://agrilifeextension.tamu.edu/browse/program-areas/>

Unit Human Resource Orientation

- Performance appraisal forms, processes, appraisal periods, policies <http://agrilifeas.tamu.edu/hr/supervisor-toolkit/>
- Professional development opportunities / career ladders <http://agrilifeas.tamu.edu/training/hr/>
- Employee Assistance Program (EAP) / alcohol and drug policies <http://agrilifeas.tamu.edu/hr/about-us/eap/>
- Insurance/Retirement/Benefits <http://agrilifeas.tamu.edu/hr/benefits-retirement/>
- Parking <http://transport.tamu.edu/parking.aspx>
- ID card <http://sbs.tamu.edu/aggiecard/>

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International Employees

- Immigration Services for Faculty & Scholars (formerly IFSS) <http://ifss.tamu.edu/Home>
- International Student Services <http://iss.tamu.edu/>
- U.S. Citizenship and Immigration Services (USCIS) <https://www.uscis.gov/>
- Social Security Administration <https://www.ssa.gov/>
- Texas Department of Public Safety <http://www.txdps.state.tx.us/>

Safety Programs/Sanitation <http://agrifeas.tamu.edu/risk-compliance/environmental-health-and-safety/>

- Ergonomics products/services and environmental issues <https://ehsd.tamu.edu/Pages/Ergonomics.aspx>
- Locations of fire extinguishers/First Aid Supplies/aspirin/AED
- Emergency procedures & evacuation routes
- Security services/policies/contact information

Travel, Purchasing and Expenses <http://agrifeas.tamu.edu/fiscal/travel/> & <http://agrifeas.tamu.edu/fiscal/disbursements/>

- Travel policies/procedures/services
- Agency credit card policies and expense report procedures
- Purchasing forms, and policies/procedures
- Business travel accident insurance
- Pro Card Training/ Concur Training/ State Rates for Hotel & Rental Cars

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Time and Attendance/Leave Policies*

- Attendance and tardiness policies
- Overtime policies <http://agrilifeas.tamu.edu/documents/310109x001.pdf>
- Breaks and meal periods
- Leave and sick leave policies/procedures
<http://agrilifeas.tamu.edu/documents/310303x001.pdf>
- Vacation policies/procedures/benefits
<http://agrilifeas.tamu.edu/documents/310303x001.pdf>
- Holiday schedule <http://agrilifeas.tamu.edu/hr/benefits-retirement/holiday-schedules/>
- Payroll schedule <http://agrilifeas.tamu.edu/hr/payroll/employee-payroll-resources/#payroll-schedule>
- Timesheet policies
- Family leave policies and procedures
<http://agrilifeas.tamu.edu/documents/310305x001.pdf>
- Worker's compensation <http://agrilifeas.tamu.edu/risk-compliance/workers-compensation/> & <http://agrilifeas.tamu.edu/documents/240101x101.pdf>

Required Forms

- Have employees sign I-9 forms and provide appropriate identification
<https://www.uscis.gov/sites/default/files/files/form/i-9.pdf>
- Have employees complete an emergency contact form* (Personal Data form on Day One) <http://assets.system.tamus.edu/files/hr/forms/181.pdf>
- Have employees complete direct deposit authorization form*
<http://agrilifeas.tamu.edu/documents/ag-501.pdf>

Professionalism, Professional Behavior and Dress

- Ethics Policy <http://policies.tamus.edu/07-01.pdf>
- Proprietary information policy
- Uniforms, if applicable

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Office Policies, Procedures, and Operations

- Telephone
 - Telephone procedures/operations
 - Telephone directory/voicemail procedures
 - Handling customer complaints/emergency calls
- Sending interoffice and U.S. mail
- Reserving a conference room
- Office furniture requests
- Keys and key cards*
- Break room locations/policies
- Copier locations and user codes
- Provide a package of basic office supplies*
- Obtain a completed nameplate order form*
- Recycling/shredding

Information Technology <http://agrilife.org/it/>

- IT Help Desk email and phone numbers <http://firstcallhelp.tamu.edu/>
- Computer/internet use policies / email policies
<http://agrilifeas.tamu.edu/documents/290199x005.pdf>
& <http://agrilifeas.tamu.edu/rules-procedures/extension/#information>

Networking

- Introduce the new employee to individuals in and outside of the unit with whom they will work*
- Provide a list of locations of other employees offices
- Conduct an in-person office tour
- Provide a list of contact information of vendors and contractors*
- Provide a list of individuals who may serve as resources/mentors*

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Other

- Conduct tours of appropriate laboratories, plants, facilities*
- Plan team-building and icebreaker exercises
- Lunch plans