**CITY OF SAN RAFAEL**

**NEW EMPLOYEE ONBOARDING PLAN & CHECKLIST**

**New Employee**:  **Title: Start Date**: **Starting Step**:

## **Admin responsibilities:**

|  | **Before they get here** | **Day 1** | **Week 1** |
| --- | --- | --- | --- |
| **All new employees** | Update Department org chart to include the new employee  Admin sends email to new employee 1 week prior to start date, CC’s Supervisor & Department Director  First-day logistics – Supervisor to provide date & time of arrival. Standard language re: dress code, where to park, etc.  Ask if any accommodations are needed prior to starting  [HR new hire paperwork](https://employees.cityofsanrafael.org/new-hire-orientation-documents/) - remind new hire to bring the documents, ID (2 forms) or passport on their first day  [Credit card acknowledgement](https://employees.cityofsanrafael.org/creditcards/) (if receiving credit card)  [Bargaining unit’s MOU](https://www.cityofsanrafael.org/employee-contracts/)  Current Department Org Chart (updated with their name)  Link to [New Employee Onboarding](https://employees.cityofsanrafael.org/onboarding/) website  Submit [new employee request form](https://employees.cityofsanrafael.org/new-employee-request-form/) to DSOG for City email and desk phone  Send completed PAR form to HR  Send credit card request form to Finance (if needed)  Set up and assign City cell phone (if needed)  Request from Xantrion  Set up new employee with printer/scanner access  Install computer programs incl. Eden, Shortel, Adobe, etc.  Determine computer set up needed (use existing computer or order new laptop)  Order business cards (confirm with new employee name, contact, title, etc.)  Order desk name plates  Set up with CP Connect account (if needed)  Set up with employee website editing account (if needed)  Check inventory of safety gear/uniforms and order if needed | Collect completed new hire paperwork from employee & send to HR. Review ID(s) for I-9  Ping Department Director to send dept-wide introduction email  Provide employee list of websites and bookmarks for browser  Issue safety gear/uniforms | Write introduction of employee for Friday memo (or get from Supervisor)  Provide employee [list of City policies to review](https://employees.cityofsanrafael.org/policies-procedures/)  Set up a CP Connect training  Set up with employee website editing training (if they need it) |

## Notes/comments:

## **Supervisor responsibilities:**

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| --- | --- | --- | --- | --- |
|  | **Before they get here** | **Day 1** | **Week 1** | **Within first 6 months** |
| **All new employees** | Send copy of offer letter to Admin  Create plan for employee’s first day and first week  Clean employee’s work station and prepare for use | Meet employee when they arrive and have a 1-on-1 meeting  Go over Department org chart and functions of various divisions  Review their job, roles, duties and expectations  Describe their team/division  Provide overview of San Rafael & local government  Tour of Department building with introductions  Set up employee with a peer “buddy” or point person to ask questions to  Take photo for [City ID card](https://employees.cityofsanrafael.org/documents/id-card-request-form/), email to Admin  Ask employee to take 1-2 hours to review HR [New Employee Onboarding](https://employees.cityofsanrafael.org/onboarding/) webpage and [Department webpage](https://employees.cityofsanrafael.org/departments/) if they have not yet  Help employee log in to workstation. Check all programs, email, etc. are working  Set up City email signature with [City branding](https://employees.cityofsanrafael.org/brand-guidelines/)  Add new employee to appropriate Outlook meeting invites | Ensure the employee attends their HR new hire orientation  Go over [map of San Rafael neighborhoods](https://employees.cityofsanrafael.org/documents/map-of-san-rafael-neighborhoods/)  Identify opportunities for job shadowing, realistic job previews  Provide immediate & meaningful feedback  Plan to connect with employee every day of their first week  Set up time & Outlook invite for weekly check-ins  Set up “101” meetings on Outlook between that employee and other Department staff/divisions, as well as other departments  Training for filing system  Review [Finance’s “Purchasing Overview” webpage](https://employees.cityofsanrafael.org/purchasing/) | Ask employee how they are “settling in” to the organization  Set up 1:1, 15min Teams introduction meetings with other Dept Directors (when appropriate for position)  Set and review performance and development goals  Provide regular feedback on their performance  Give a performance evaluation. Refer to [Labor Union MOU’s](https://www.cityofsanrafael.org/employee-contracts/) for due date  Get feedback from employee on their onboarding experience. Relay this feedback to Admin |

## Notes/comments: