**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: