



Supervisor Checklist

FOR EMPLOYEES

Note to supervisors . . .

This Supervisor’s Checklist for Employees provides a framework to assist with staff members at every stage of their employment from their orientation to departure. We suggest that you:

- become familiar with the content of the guide;
 - ensure that you and your work area are prepared for the orientation process by going through Step 1 Pre-Arrival of Employee checklist;
- and*
- review all of the checklists to note any items that are not applicable or that need to be added.

TABLE OF CONTENTS

Step 1: Pre-Arrival of Employee Checklist..... 3

Step 2: Introduction to Workplace Checklist 5

Step 3: Introduction to Department and Roles/Responsibilities Checklist 6

Step 4: Documentation Checklist 8

Step 5: Orientation Workshop(s) Checklist 9

Step 6: Follow-up Checklist10

Step 7: Checklist for Departing Employees.....11

Comments on improving this guide for future use are welcome. Please submit any feedback to the Human Resources Department.

STEP 1: PRE-ARRIVAL OF EMPLOYEE

<i>Item/Activity</i>	<i>Completed or N/A</i>	<i>Completed By</i>
Relevant Orientation Documents		
1. Position description		
2. Organizational chart(s)		
3. Strategic Plan		
4. Manuals website link		
5. Collective Agreement website link		
6. Benefits Handbook		
7. Addition/Deletion/Change Access Form (for computer accts)		
8. Business cards		
9. Keys and Fobs (keep track of what is issued)		

<i>Item/Activity</i>	<i>Completed or N/A</i>	<i>Completed By</i>
Work Site Readiness		
1. Furniture and Equipment		
2. Desk/chairs		
3. Telephone		
4. Computer		
5. Photocopy ID number		
6. Other equipment/tools		
7. Supplies		
8. Pens/pencils/paper/writing pads		
9. Diary/calendars		
10. Stapler		
11. Other office/work site supplies		
12. Telephone Directory - External		
13. Internal Telephone Directory		
14. Departmental list/directory		

<i>Item/Activity</i>	<i>Completed or N/A</i>	<i>Completed By</i>
Announcements		
1. Memo to staff announcing employee's arrival		
2. Letter to key external contacts, announcing employee's appt		
Initial Training		
3. Any immediate required training		
4. Computer/applications training		
5. On-the-job computer orientation, electronic mail, networks		
6. Job content training		
7. Orientation to office equipment		
8. Filing/records system		
9. Other training		

NOTES:

STEP 2: INTRODUCTION TO WORKPLACE

<i>Item/Activity</i>	<i>Completed or N/A</i>	<i>Completed By</i>
Work Station Orientation		
1. Initial welcome		
2. Overview of office/desk station		
Departmental Tour		
1. Office areas		
2. First aid station/supplies		
3. Safety equipment		
4. Washrooms		
5. Conference/meeting rooms		
6. Reception area		
7. Library/resource area		
8. Photocopier		
9. Fax machine		
10. Staff/coffee areas		
11. Supplies/forms cabinet(s)		
12. Mail drop/pick-up		
13. Building security/keys		
14. Elevator/stairs		
15. Fire/emerg. Evac. exits/routes		
16. Parking		

Introductions

1. Introduction to on-site staff
members and their responsibilities

2. Introductions to key contacts and their
responsibilities within department

3. Finance and personnel staff

4. Other departments

5. Students/Client(s)

6. Interest/Community groups

NOTES:

STEP 3: INTRODUCTION TO DEPARTMENT AND ROLES/RESPONSIBILITIES

<i>Item/Activity</i>	<i>Completed or N/A</i>	<i>Completed By</i>
Overview		
1. Mission/goals of College/Dept		
2. Overview of position description		
3. Position objectives/expectations		
4. Outline of first job assignment(s)		

<i>Item/Activity</i>	<i>Completed or N/A</i>	<i>Completed By</i>
Relationships		
1. Organizational chart		
2. Reporting relationships		
3. Communication channels/networks		
4. Committees		
5. Supervisory expectations		
5. Scheduling one-month follow-up		

NOTES:

Conditions of Employment

<i>Item/Activity</i>	<i>Completed or N/A</i>	<i>Completed By</i>
1. Attendance		
2. Hours of work/scheduling		
3. Meal and coffee breaks		
4. Reporting of absences		
5. Leave application and recording		
6. Time records/sheets		
7. Overtime: scheduling/approval		
8. Overtime: pay/compensatory time		
9. Workplace clothing		
10. Conflict of interest		
11. Informal norms, rules, customs		
12. Overview perf. appraisal process		
13. No smoking policy		
14. Safety policies/procedures		
15. Other job-specific procedures		
16. Computer email/internet use		

General Office Procedures

<i>Item/Activity</i>	<i>Completed or N/A</i>	<i>Completed By</i>
1. Reception/receiving visitors		
2. Telephone system/procedures		
3. Telephone answering protocol		
4. Call forwarding		
5. Long distance calls		
6. Personal calls		
7. Sign-out and security of keys		
8. Use of photocopier		
9. Use of fax machine		
10. Purchasing/acquisition procedures		
11. Purchase Orders		
12. Accident reporting		
13. Damage and loss reporting		
14. Processing complaints/grievances		

NOTES:

STEP 4: DOCUMENTATION

<i>Item/Activity</i>	<i>Completed or N/A</i>	<i>Completed By</i>
Documentation Info and Forms		
1. TD-1		
2. Payroll Deposit Authorization		
3. Benefit plans		
4. Health		
5. Dental		
6. Disability		
7. Life Insurance		
8. Superannuation/pension		
9. Designation of Beneficiary		
10. Union application/dues		

NOTES:

Other Information

<i>Item/Activity</i>	<i>Completed or N/A</i>	<i>Completed By</i>
1. Collective Agreement		
2. Evaluation/Review Process		
3. Leave accrual and use		
a. Vacation		
b. Sick		
c. Special		
d. Leave without pay		
e. Other leave		
4. Travel		
5. Anniversary date		
6. Pay schedule		
7. Explanation of pay cheque deductions/codes		
8. Personal documents required (marriage/birth certificates, etc.)		
9. Other benefits/allowances		
10. ID card		
11. Specific programs/policies		

NOTES:

STEP 5: ORIENTATION WORKSHOP(S)

<i>Item/Activity</i>	<i>Completed or N/A</i>	<i>Completed By</i>
Participation in Orientation Workshop(s)		
1. Workshop scheduled		
2. Workshop attended		
3. Follow-up session scheduled		
4. Participation - follow-up session		
6. Evaluations/follow-up completed		

Departmental Orientation Session(s)

<i>Item/Activity</i>	<i>Completed or N/A</i>	<i>Completed By</i>
1. Session(s) scheduled		
2. Session(s) attended		
3. Evaluations/follow-up completed		

NOTES:

STEP 6: FOLLOW-UP

<i>Item/Activity</i>	<i>Completed or N/A</i>	<i>Completed By</i>
One-month Follow-up Meeting		
1. Questions addressed from preceding orientation steps		
2. Discussion of job-related achievements/problems/concerns		
3. Review of goals, objectives, work plans		
4. Review of progress and performance expectations		
5. Scheduling for three-month follow-up meeting		

Three-month Follow-Up Meeting

<i>Item/Activity</i>	<i>Completed or N/A</i>	<i>Completed By</i>
1. Questions/answers from preceding orientation steps		
2. Discussion of job-related achievements/problems/concerns		
3. Review of goals, objectives, work plans		
4. Review of progress and performance expectations		
5. Scheduling of probationary performance evaluation		
6. Evaluation of the orientation program with supervisor		
7. Feedback to HR on guide/workshops		



STEP 7: STEPS FOR DEPARTING EMPLOYEES

<i>Item/Activity</i>	<i>Completed or N/A</i>	<i>Completed By</i>
1. Received resignation letter/ confirmed termination date		
2. Advised HR of resignation/termination		
3. Arrange for return of keys and Fobs and Other work property		
4. Exit Interview		

NOTES: