

**BUSINESS OFFICE NEW HIRE ORIENTATION CHECKLIST**

Employee Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Supervisor/Trainer: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Start Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Physical Orientation

* Name badge (from HR)/door entry access/office key
* Review parking/get pass from HR
* Department/Building Tour - Restrooms/Breakroom
* Office Orientation (desk, printers, files, etc)
* Mail (Interschool mail and postal service)
* Schedule when to attend HR Orientation: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Review Emergency Procedures (Crisis Quick Reference Flip Chart)
* SafeSchools Training (website/email notification)
* Safety/Personal Belongings

Relational/Scheduling Orientation

* Procedure for calling in sick/requesting time off
* Lunch/Break schedule
* Sick/ Vacations days - sick after 90 days, vacation after 6 months, extra holidays can be used prior to 6 months
* Introduce to co-workers/other staff
* Chain of command - organizational chart
* Check-in documents/probation period review
* Employee calendar

Technology Orientation

* Phone system/VM set up
* Windows login
* Google - Mail, shared documents, etc
* Log-ins and correct access to appropriate programs/software
* Shared drive
* Where to find files/how and where to save files properly
* INTRANET (Employee Portal)
* Appropriate personal cell phone use
* Help desk tickets
* Acquisition of required hardware for position (laptop, tablet, etc)
* Equipment checkout (external use)

Job Specific Orientation

* Review job description and training plan
* Do any special accommodations need to be made (chair, desk setup, schedule, etc)
* Order any necessary supplies
* Provide employee with position training materials (if available)
* Keys

Other

* Quarterly birthdays/ BPS gear
* MiCare appointments
* Desk name plate
* Seating chart

Employee Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Supervisor Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_



**PROBATION PERIOD MANAGER/TRAINER REVIEW**

Employees Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Supervisor/Trainer\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Today’s Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Probationary Period Completion Date:

* 45 day
* 90 day

1. Employee demonstrate the ability to develop positive, cooperative working relationships with other staff.
2. Employee is courteous and provides good customer service to customers (staff, public, administrators).
3. Employee’s attendance has been regular, reliable and punctual.
4. Employee follows the organization’s policies and procedures.
5. Evidence that any information given in the employee’s job application or interview was false or misleading?
6. Employee demonstrates the knowledge and skills necessary to perform the job.
7. Employee performs job duties in a competent and efficient manner.
8. Confidence that Employee will be able to handle untested tasks? (Ie: Seasonal requirements of the job that employee has not yet been trained on)

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Signature of Trainer



**PROBATION PERIOD EMPLOYEE CHECK-IN**

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Position: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Today’s Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Probationary Period Completion Date:

* 45 day
* 90 day

1. So far, is the job what you expected it to be?
2. Do you feel you have the information, tools & resources needed to do your job successfully?
3. Do you have a good understanding of your role within the organization?
4. What are some elements of the position you are *not* enjoying as much? Is this because you have not been given the proper tools or training in this area?
5. Are you receiving enough support and feedback from your supervisor/trainer?
6. Are you feeling either over-challenged or bored (overwhelmed or stagnating?)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature of Employee

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Supervisor Signature



**PROBATION PERIOD APPRAISAL (120 day)**

Need to complete Performance Evaluation per our Collective Bargaining Agreement

* Billings Classified Employee Association (BCEA)
* Local 7770 Montana Federation of Public Employees (MFPE)
* Administrative Support (Contract Support)