

EOTA – Business Form

	<p><i>Document Title:</i> New Employee Checklist</p> <hr/> <p><i>Document Number:</i> MGTF-004 Rev. 10_0806</p>
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<p><i>Parent Document:</i> MGTP-002, Skill Set / Training Process</p>	<p><i>Notify of Changes:</i> EOTA Managers</p>
<p><i>Referenced Document(s):</i> N/A</p>	

Revision History:

Rev.	Description of Change
A	Initial Release
B	Changes made 2/28/08
08_0411	Added New Hire Orientation Course to checklist, added guidance for completion of checklist
09_0409	Updated “Responsible Person” on checklist.
09_0421	Added “Initiate/Update U.S. Access profile” as a new FMT responsibility. Renumbered checklist items.
09_0424	Changed document name and removed references to “Transfer” employee. No employees would fit the “transfer” category.
10_0422	Removed item 10. “Initiate/Update U.S. Access Profile” (no longer performed on site) and inserted “Initiate Information Sheet for Sponsorship of HSPD-12 Credential Request for Action (DOE F 206.xx)” as the new item 10. Minor edits for clarification. Deleted “Anticipated Completion Date” column.
10_0608	Added access to Entrust account
10_0716	Added securing a DBIDS Card for access to KAFB.
10_0806	Added COOP POC contact to checklist.

New Employee Checklist

Employee Name:	Date of Hire:
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√	Activity	Person Responsible	Completion Date
	Administrative		
	<i>Security</i>		
	1. Issue Office Keys – Activate a Door Code		
	2. Update Phone List		
	3. Provide Current Lists: Phone and instructions, current task numbers, Vendors, course list, holiday calendar and organizational charts		
	4. Set Work Schedule & Post		
	5. Facility Tour		
	6. Basic IT Security Course and IT exam		
	7. Security Briefing/Badging		
	8. Arrange for issuance of DBIDS card (only if security clearance required)		
	9. DOE MIS Gateway registration		
	10. Initiate Clearance Papers/Transfer Clearance		
	11. Initiate Information Sheet for Sponsorship of HSPD-12 Credential Request for Action (DOE F 206.xx)		
	12. Verify if DBIDS is required? (Contact Badge office at 845-5604)		
	<i>IT</i>		
	13. Assign Phone & Extension		
	14. Set up Voicemail		
	15. Assign Computer		
	16. Set up Computer Login and Password		
	<i>Facilities</i>		
	17. Assign Office Number & Work Station		
	Manager		
	18. Department Organization Chart Review/Update		
	19. Position Description Review		
	20. Skill Set Model Completion		
	21. Time-related policies Work hours, overtime, timesheet submission, vacation/sick time, holidays and performance evaluation		
	22. Business Management System Overview		
	23. Formal Orientation		
	24. Q-Pulse Introduction and Addition		
	25. Quality Policy Awareness		
	26. Review Sample Timesheet/Group Calendar		
	27. New Hire Orientation Course		
	28. Audit Awareness Training		
	29. Notify the COOP accountability POC to add individual to contact list. Current POC - Yvonne.Jackson@nnsa.doe.gov		

New Employee Checklist Guidance

Item #	Activity	Process All steps must be completed but not necessarily in the order listed.	Responsible Person (or designee)
Administrative			
Security			
1	Issue Office Keys	Give only keys needed & take from lock box in secured room and update key log spreadsheet. Activate Door Code.	Training Systems Lead/ Mgmt Rep.
2	Update Phone List	Add new employee to EOTA phone lists & employee emergency list spreadsheets.	Training Systems Lead
3	Provide Current Lists	Add employee to lists & give them a current phone list & instructions, task numbers, vendors list, course list, holiday calendar & organizational charts.	Training Systems Lead
4	Set Work Schedule	Employee will set work schedule with Mgmt. then post hours on the J/Admin/Schedules.	New Employee
5	Facility Tour & Emergency/Safety Procedures	Give tour of facility, restrooms, kitchen, elevators, fire exits, assembly point; explain emergency procedures and site/safety rules (injury procedures, evening lock-up process, etc.).	Training Systems Lead
6	Basic IT Security Review & Exam	Employee completes the IT Security Course and exam within 5 business days of hire. Course and exam will be distributed by the QAM. Completed exam will be emailed to QAM for grading and documentation on the SSM. (Course and exam currently being re-worked)	New Employee/QAM
7	Security Briefing & Badging	Escort to service center for security briefing as necessary (Mondays 8:00 a.m.). Take all necessary forms (orange card, etc). Obtain badge at service center after briefing.	Training Systems Lead
8	DBIDS Card	While securing DOE SC badge, have employee secure a DBIDS Card for access onto KAFB. If retired military, DBIDS	Training Systems Lead
9	DOE MIS Registration	Do MIS registration on-line from our office to DOE website.	Training Systems Lead
10.	Initiate Clearance Papers/Transfer	Once informed by management start clearance paper processing with employee.	Training Systems Lead
11.	Initiate DOE F 206.xx	Initiate Information Sheet for Sponsorship of HSPD-12 Credential Request for Action (DOE F 206.xx) and route to FMT.	Training Systems Lead
12.	Entrust Access	Request access to Entrust account if required.	Training Systems Lead
Information Technology			
13	Assign Phone and Extension	Set up a new phone and extension, inform Training Systems Lead of number.	Network Admin.
14	Set Up Voice Mail	Set up voice mail to the extension given to new employee.	Network Admin.
15	Assign Computer	Assign a computer and inform the Property Custodian of the inventory control number.	Network Admin.
16	Set Up Computer Password	Assign a login and password to new employee.	Network Admin.
Facilities			
17	Assign Office & Desk	Assign office # to the new employee.	Mgmt.

Manager			
18	Dept. Organizational Chart Review/Update	Review the EOTA organizational chart, update and inform Training Systems Lead and graphics designer of new employee title.	Mgmt.
19	Position Description Review	Overview of Position Description and expectations.	Mgmt.
20	Skill Set Model	Annotation of employee skills, knowledge and abilities on Skill Set Model.	Mgmt.
21	Time Related Policies	Explain work hours, overtime, timesheet submission, vacation, sick time, holidays, and performance evaluation.	Mgmt.
22	BMS Overview	Overview of Business Management System and ISO Standards.	Mgmt Rep.
23	Formal Orientation	Orient employee with computer, systems & practices, storage rules, document management, web site, project matrix.	Mgmt.
24	Q-Pulse Entry	Add to Q-Pulse & Review functions required by employee.	Mgmt Rep.
25	Quality Policy	Review of EOTA Quality Policy.	Mgmt Rep.
26	Timesheet & Group Calendar Use	Explain how to complete the timesheet (codes, etc), and what goes on the group calendar.	Mgmt.
27	New Hire Orientation Course	Have employee take the EOTA new hire orientation course.	Mgmt.
28	Audit Awareness	Overview of Internal Audit process and employee responsibilities.	Mgmt Rep.
29	COOP Accountability	Notify the COOP accountability POC to add individual to contact list.	Training Systems Lead