

## New Employee and Transfer Checklist

Name: \_\_\_\_\_ Hire/Transfer Date: \_\_\_\_\_

Department: \_\_\_\_\_ Supervisor: \_\_\_\_\_

**Instructions:** This checklist must be completed and filed in the employee's permanent HR personnel file in compliance with The Joint Commission, OSHA, institutional and legal requirements. Return completed checklist by submitting a Help Desk ticket via Oracle within **45 days of hire or transfer**.

HOSPITAL ORIENTATION	DEPARTMENT ORIENTATION
<p><b>A. Occupational Health Clearance</b> <i>Clearance must be obtained prior to first work shift</i></p> <p><b>B. New Hire HR Onboarding Forms</b> <i>Must be completed on or before date of hire</i></p> <ul style="list-style-type: none"> <li>Abuse Violence Reporting Requirements</li> <li>HIPPA Confidentiality Statement</li> <li>I-9 Verification</li> <li>ID Badge</li> <li>Job Description/Offer Letter</li> <li>Licensure Verification (if applicable)</li> <li>Oath of Allegiance, Patent Policy, and Patent Acknowledgement</li> <li>Sexual Harassment Acknowledgement</li> </ul> <p><b>C. New Hire Onboarding Information/Optional Forms</b> <i>Provided to the New Hire during HR Onboarding</i></p> <ul style="list-style-type: none"> <li>Benefits</li> <li>Compensatory Time-Off election (if applicable)</li> <li>Direct Deposit</li> <li>Dress Code Policy</li> <li>Employee Incentive Programs</li> <li>Payroll Calendar</li> <li>Smoke-Free Policy</li> <li>PTO/Vacation Policies</li> <li>Transportation</li> <li>UCSF Privacy and Confidentiality Handbook</li> <li>W-4</li> </ul> <p><b>D. New Employee Orientation</b> <i>Must be completed within 30 days of hire</i></p> <ul style="list-style-type: none"> <li>Clinical Enterprise Compliance Program</li> <li>Code of Conduct</li> <li>Confidentiality, HIPAA, and Privacy Security</li> <li>Cultural Competency</li> <li>Environmental Health and Safety Management</li> <li>Emergency Management and Security</li> <li>Infection Prevention &amp; Control</li> <li>Organization History, Mission, Vision, Values, &amp; Goals</li> <li>Patient Relations/Decedent Affairs</li> <li>Patient Rights and Responsibilities</li> <li>Patient Safety and Quality</li> <li>PRIDE Values</li> <li>Risk Management</li> <li>Sexual Harassment</li> <li>Spiritual Care</li> <li>Workplace Violence</li> </ul>	<p><b>E. Department Orientation</b> <i>Must be completed within first 3 work shifts</i></p> <p><i>Initial</i> ____ <i>Date</i> ____ Attendance (Breaks, Punctuality, Work Schedule)</p> <p><i>Initial</i> ____ <i>Date</i> ____ Certification/Licensure Requirements/Renewals</p> <p><i>Initial</i> ____ <i>Date</i> ____ Department Dress Code</p> <p><i>Initial</i> ____ <i>Date</i> ____ Disaster/Emergency Plans (Fire Safety, Hazardous Materials and Waste)</p> <p><i>Initial</i> ____ <i>Date</i> ____ General Tour (Breakroom, Confidential Shred Bins, Lockers, Restrooms, etc.)</p> <p><i>Initial</i> ____ <i>Date</i> ____ Job Description, Performance Standards &amp; Reviews</p> <p><i>Initial</i> ____ <i>Date</i> ____ Location of Unit Equipment Manuals</p> <p><i>Initial</i> ____ <i>Date</i> ____ Location/Review of Environment of Care Manual/Websites (Infection Control, MSDS, etc.)</p> <p><i>Initial</i> ____ <i>Date</i> ____ Payroll/HBS (Overtime, Time Off Requests, Time Reporting)</p> <p><i>Initial</i> ____ <i>Date</i> ____ Reporting Work-Related Injuries</p> <p><b>F. Additional Orientation</b> <i>Must complete one of the following within 30 days of hire</i></p> <p><input type="checkbox"/> <b>Ambulatory Orientation</b> – required for all clinical employees working in Ambulatory clinics (HAs, LVNs, MAs, RNs, Techs, etc.)</p> <p><input type="checkbox"/> <b>Department Orientation</b></p> <p><input type="checkbox"/> <b>Inpatient Nursing Orientation</b> – required for all employees working in inpatient areas (PCAs, PSAs, RNs, etc.)</p> <p style="text-align: center;"><i>*See page 2 for additional information on topics covered</i></p>

*I have completed all orientations and trainings as indicated on this checklist. I have reviewed any questions regarding information or skills referred to on this list with my department director, manager, supervisor, or preceptor.*

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

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

## New Employee and Transfer Checklist

The purpose of this guide is to help Managers identify the specific issues to be covered in each category before being initialed and dated on the New Employee and Transfer Checklist. A clinic/department/unit may have unique topics/issues in addition to this form.

### E. Department Orientation

*Topics to be covered by the department within the first 3 work shifts*

#### Attendance (Breaks, Punctuality, Work Schedule)

- Legal obligations & policy review

#### Certification/Licensure Requirements/Renewals

- Process for tracking renewals
- Employee's responsibility to renew and provide proof
- Consequences of expired certification/licensure

#### Department Dress Code

- Policy review

#### Disaster/Emergency Plans (Fire Safety, Hazardous Materials and Waste)

- Employee's role in an emergency situation
- Evacuation route
- Hazardous materials used on unit and how to dispose
- Location of fire pulls
- Location & type of extinguishers
- Location, type, and use of personal safety devices
- Unit plan for hazardous chemical spill

#### Job Description, Performance Standards & Reviews

- Review Employee's job description and discuss expectations and goals
- Review and provide Employee with a copy of performance appraisal tool
- Review timeframe for performance appraisals
- Review plan to validate competencies & tools for validation
- Ensure that Employee understands they **may not** perform without supervision until competency is established

#### Location/Review of Environment of Care Manual/Websites

- Disaster
- Health & Safety
- Infection Control
- MSDS

#### Reporting Work-Related Injuries

- How to report
- Timeframes

### F. Additional Orientation

*Complete one of the following orientations within 30 days of hire*

#### Department Orientation:

- Age specific competencies
  - Describe ages of customers/patients with whom Employee will work with
- Communication guidelines (internal & external)
  - Bulletin boards
  - E-mail
  - Fax
  - Interdepartmental mail
  - Staff meetings
- Department Goals:
  - Current goals and how Employee can help to achieve them
- Initial Competencies:
  - Discuss plan for validating competencies and use of validation tools
- IT Systems (APeX, Email, Pyxis, etc)
  - Attend classes if required
  - Review access and use of systems
- Reporting Relationships
  - Fellow employees/peers and leadership team (directors, managers, and supervisors)
  - Physicians
- Use of Equipment & Supplies
  - Identify equipment requiring training/competency validation
  - Location and instructions for use

#### Ambulatory Orientation

- Reviews all topics listed under "Department Orientation" in addition to unit specific hands-on training and testing
- For more information on topics covered, please contact Ambulatory Clinic Administration

#### Nursing Orientation

- Reviews all topics listed under "Department Orientation" in addition to unit specific hands-on training and testing
- For more information on topics covered, please contact INEX