

# APPOINTMENT CHECKLIST

**Instructions:** Immediately following the selection of a new employee, please complete the items identified on this form.

-- ORIGINATING UNIT --		
NAME OF EMPLOYEE	CLASSIFICATION	POSITION CONTROL NO.
DIVISION/INDEX		SUPERVISOR
*DATE E-MAILED TO "DL - APPOINTMENT"		START DATE
TYPE OF APPOINTMENT		
<input type="checkbox"/> NEW TO STATE SERVICE	<input type="checkbox"/> TEMPORARY APPOINTMENT	<input type="checkbox"/> INTERNAL TRANSFER
<input type="checkbox"/> CSUS	<input type="checkbox"/> CONTRACTOR	<input type="checkbox"/> TRANSFERRED FROM ANOTHER STATE AGENCY

## -- MANAGER/SUPERVISOR TIMELINE FOR NEW EMPLOYEES --

**TEN (10) DAYS PRIOR TO NEW EMPLOYEE'S START DATE**

- Computer/telephone—Immediately following knowledge of the new employee appointment, complete a Technology Services Division (TSD) User Account Modification Form (SPECIFY FORM NO.) to establish user accounts for network, e-mail, and telephone access. Forward the completed form to TSD's Help Desk (unless instructed by your division's IT Coordinator to handle differently).
- Schedule new employee appointment--Call Personnel Services Division (PSD)/Transactions Office at <ENTER APPLICABLE NUMBER> to schedule a new employee appointment for their first day of work. This appointment must occur before a security badge can be issued. This appointment is not necessary for an internal transfer.
- Photo identification/key card—Prepare Cardkey Security Access Request Form (SPECIFY FORM NO.) and forward to Facilities Management. A cardkey will be issued to the employee at their new employee appointment with PSD on their first day of work.
- Personnel locator form—Complete a Personnel Locator (SPECIFY FORM NO.) and distribute according to distribution list on bottom of form.
- Time sheet—Ensure that the attendance clerk has all necessary information to prepare employee's time sheet (i.e., employee's full name, title, office, SSN, position number, and index/PCA number).

**FIRST DAY OF WORK—(New employees must first report to the PSD/Transactions Office, Room 1802).**

- Mandatory forms (Forms can be found in the intranet forms center)
  - Review IT policies with employee. Have employee sign off on the Appropriate Use of Electronic Information and Systems Statement (SPECIFY FORM NO.)
  - Fill out an Employee Emergency Information Card (SPECIFY FORM NO.)
  - Complete the Appointment Checklist (SPECIFY FORM NO.)
- Prescheduled new employee appointment—Mandatory forms must be taken to their prescheduled PSD/Transactions Office new employee appointment. Not required for internal transfers.
- Orientation checklist—Initiate Orientation Checklist (SPECIFY FORM NO.) with new employee. Not required for internal transfers.

SUPERVISOR'S SIGNATURE	DATE
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\*Include employee's name, classification, last four digits of their social security number, unit number, supervisor's name, type of employee (i.e., Volunteer, Student, or Civil Service Employee) and anticipated date of appointment.