

# San Francisco Region Manager's Checklist for New Employee Orientation

This checklist is divided into sections for Pre-Arrival, Day of Arrival, Week One, Week Two and Conditional Steps. The manager should use the link in the Pre-Arrival section to generate a welcome email to the new employee which contains links to resources regarding employee benefits. The new employee will receive several emails from the Center for Human Resources inviting them to complete the EOD forms electronically on [Onboarding Manager](#).

The checklist is a form-fillable Word template. You may annotate it for your employee and save it for future editing as a Word document. [Double-click on the underlined words to jump to those forms/web pages.](#)

*Note:* To access the links in this document, your Tools/Macro/Security setting must be either Medium or Low. Questions concerning this issue should be directed to your local ASC.

Employee Name:

EOD:

PRE-ARRIVAL	
	Completed On:
<input type="checkbox"/> Submit fingerprint cards and a copy of form OF-306 for pre-hire screening to CHR. Retain the original OF-306 for the selectee to sign in block 17b on day of arrival.	
<input type="checkbox"/> Send a <a href="#">welcome letter</a> to the new employee with logistical information (after receiving confirmation from your SCT Specialist that the selectee has accepted the official offer).	
<input type="checkbox"/> Request building pass (in FHFB, this can be done before EOD).	
<input type="checkbox"/> Prepare desk and workstation.	
<input type="checkbox"/> <a href="#">Set up 7B File</a> and optional <a href="#">7B Card</a> .	

**DAY OF ARRIVAL**

**Completed by:**

Send a second [welcome letter](#) to the new employee which includes links to WebTA training and information regarding their benefits. (some links on the letter are not accessible from home)

Encourage employee to participate in the New Hire Survey. As one of the Top 10 Best Places to Work in Government, SSA constantly strives to improve. Employees input help us to progress. One of the ways employees can tell us what you think is by participating in a survey. They will receive an invitation by email to take a New Hire Survey at least six months after starting work at SSA. The survey will ask about your experience with hiring, onboarding, and training.

In addition, once a year employees will also receive an invitation to a Federal Employee Viewpoint Survey, government-wide survey. The survey asks for feedback on all facets of employees' work experiences. Provide a copy of the [marketing flyer](#) to employee.

Add employee to WebTA. Instructions are available in the [WebTA Supervisors User Guide](#), page 9 and in the [WebTA Timekeeper User Guide](#), page 8. Frequently Asked Questions for Supervisors are available on [EST's website](#). Employees will show up in WebTA once the personnel action is completed by [Staffing and Classifications Team](#) (SCT), usually within 24 hours.

Obtain employee's **signature on block 17b (Appointee's Signature)** on the previously completed form [OF-306](#).  
Send to CHR within 5 days of EOD.

Administer [Appointment Affidavit](#) (Oath of Office). Manager **MUST** administer the Oath of Office on the **1<sup>st</sup> workday** and send signed form to CHR within 5 days of EOD.

<input type="checkbox"/> Pathways Participant Agreement form is required for all employees hired under the Pathways Program (e.g., Recent Graduate or Presidential Management Fellows). <ul style="list-style-type: none"> <li>• <a href="#">Pathways Recent Graduates Program Participant Agreement</a></li> <li>• <a href="#">Pathways Internship Program Participant Agreement</a></li> <li>• <a href="#">Pathways Presidential Management Fellows (PMF) Program Participant Agreement</a></li> </ul>	
<input type="checkbox"/> Enroll in <a href="#">EPECS</a> (HSPD-12).	
<input type="checkbox"/> Request <a href="#">PIN access</a> after you have successfully completed the sponsoring stage of EPECS.	
<input type="checkbox"/> Set-up LAN, Email and TSRP phone: Done by ASC/SLC/SYSCO. For RO employees, <a href="#">LAN and Email</a> is set up by Center for Security and Automation. For FHFB, post new employee information on the <a href="#">FHFB intranet directory</a> . <a href="#">TSRP User Guide</a> can be found on HBFT's website.  ASC/SLC/SYSCO name: ASC/SLC/SYSCO phone: ASC/SLC/SYSCO email:	
<input type="checkbox"/> Request building pass, card, cipher lock code or keys.	
<input type="checkbox"/> Request emergency contact information.	
<input type="checkbox"/> Introduce employee to staff, guards, etc.	
<input type="checkbox"/> Add employee to phone, office, and leave rosters.	

<input type="checkbox"/> Assign the employee an office buddy (another employee who will be a resource person for the new employee and can assist in orientation by providing peer information to the new employee).	
<input type="checkbox"/> Conduct an office tour.	
<input type="checkbox"/> Give employee a copy of their <a href="#">position description</a> .	
<input type="checkbox"/> Review and update: Regional and National (1-855-772-2996)Emergency Numbers Office Physical Security Action Plan	
<input type="checkbox"/> View <a href="#">Identity Protection Program</a> video.	
<input type="checkbox"/> Provide Federal Benefits <a href="#">FastFacts</a> link to employee.	
<b>Explain/Review:</b>	<b>Completed On:</b>
<input type="checkbox"/> Review: <a href="#">Types of Work Schedules</a> <a href="#">Annual Leave and Sick Leave Accruals</a> <a href="#">Procedures for Requesting Leave</a> (scroll to the bottom) <a href="#">Pay and Hours of Work</a>	
<input type="checkbox"/> <a href="#">Tour of Duty, Sign-in/Sign-out Procedures, Breaks/Lunches</a>	

Procedures for calling in when employee is late or cannot come to work.

For bargaining unit employees, procedures should be consistent with [Article 31, Section 5](#) of the SSA-AFGE National Agreement.

### WEEK ONE

Completed On:

Remind employees to submit EOD forms by the dates indicated on [Onboarding Manager](#). The following forms must be submitted through Onboarding Manager:

- FMS-2231, Fast Start Direct Deposit
- SF-2809, Health Benefits Election Form
- SF-2817, Federal Employees Life Insurance Form
- Tax Forms
- TSP-1, Thrift Savings Plan Election Form

The following forms must be mailed:

- Mail the following forms to Social Security Administration, Center for Human Resources, Employee Services Team, P.O. Box 4115, Richmond, CA 94804:
  - [SF-1152](#) Designation of Beneficiary for Unpaid Comp of Deceased Federal Employees Form
  - [SF-2823](#) Designation of Beneficiary for Life Insurance Form (FEGLI)
  - [SF-3102](#) Designation of Beneficiary Form for Federal Employees Retirement System (FERS)
- Mail the following form to Office of Personnel (OPM), P.O. Box 45, Boyers, PA 16017:
  - [SF-2808](#) Designation of Beneficiary Form for Civil Service Retirement System (CSRS) (*only applies to employees with previous civilian federal service, refer to [New Employee Benefits Orientation](#)*)
- Mail the following form to Thrift Savings Plan Board, P.O. Box 38538, Birmingham, AL 35238 or fax to (866) 817-5023:
  - [TSP-3](#) Thrift Savings Plan Designation of Beneficiary Form (*leave No. 2. TSP account*)

<input type="checkbox"/> Review <a href="#">SSA's Core Values</a> , <a href="#">Agency Strategic Plan</a> , <a href="#">Mission of SSA</a> .	
<input type="checkbox"/> Discuss the <a href="#">Privacy Act</a> and <a href="#">Conduct When Working For SSA</a>	
<input type="checkbox"/> Review the Safeguarding Personally Identifiable Information (PII) <a href="#">Annual Reminder</a> and sign the <a href="#">Acknowledge Statement</a> .	
<input type="checkbox"/> Review the policy on the prevention of <a href="#">Sexual Harassment</a> .	
<input type="checkbox"/> <a href="#">Register</a> new hire(s) for technical training.	
<input type="checkbox"/> Assign a training mentor.	
<input type="checkbox"/> Demonstrate use of office equipment, including phone, voicemail, fax, and copier. Set up employee's voicemail.	
<input type="checkbox"/> Issue PIN and explain workstation security, including: Logon/logoff procedures PIN and password	
<input type="checkbox"/> Notify the Union of the new employee.	
<b>Explain/Review:</b>	<b>Completed On:</b>
<input type="checkbox"/> <a href="#">SSA Organizational Chart</a>	
<input type="checkbox"/> <a href="#">Region IX Organizational Chart</a>	
<input type="checkbox"/> <a href="#">Probationary or Trial Period</a>	
<input type="checkbox"/> <a href="#">SFNet</a> /Component/ <a href="#">Area</a> websites	
<input type="checkbox"/> <a href="#">Restrictions on System Access</a> (sign sanctions document) and complete <a href="#">Automated Sanctions Training Certification Program</a> within 45 days of hiring.	

<input type="checkbox"/> Review mandatory Annual Information Security Awareness Training. According to the current <a href="#">Information Security Training and Awareness Policy 9.3.1</a> and <a href="#">Rules of Behavior for Users and Managers of SSA's Automated Information Resources 2.4</a> , all new hires must complete the annual information security awareness training within <b>thirty (30) days of onboarding</b> .	
<input type="checkbox"/> <a href="#">Think Twice First</a> website, specifically: <ul style="list-style-type: none"> <li><input type="checkbox"/> Protecting PII</li> <li><input type="checkbox"/> Fraud</li> <li><input type="checkbox"/> Annual Personnel Reminders</li> <li><input type="checkbox"/> Use of Email and Internet Policy</li> <li><input type="checkbox"/> Lock Before You Walk</li> <li><input type="checkbox"/> Time and Attendance Accuracy</li> <li><input type="checkbox"/> Ethics</li> <li><input type="checkbox"/> Use of Government Equipment Policy</li> <li><input type="checkbox"/> Outside Employment</li> <li><input type="checkbox"/> The Hatch Act</li> </ul>	
<b>WEEK TWO</b>	
<b>Completed On:</b>	
<input type="checkbox"/> Issue HSPD-12 Credential.	
<input type="checkbox"/> <a href="#">Explain</a> and issue PACS plan once HRODS updates.	
<input type="checkbox"/> Issue Performance Plan and discuss expectations, including <a href="#">Career Ladder Plan</a> and <a href="#">CLP Policy</a> regarding expectations for promotion if applicable.	
<b>Explain/Review:</b>	
<b>Completed On:</b>	
<input type="checkbox"/> <a href="#">Whistleblower Protection Act</a>	

<input type="checkbox"/> Supplemental Training Resources: <a href="#">SSA LMS</a> <a href="#">Office of Learning</a> <a href="#">Materials and Guides</a>	
<input type="checkbox"/> <a href="#">Social Security Online</a> and <a href="#">eServices</a>	
<b>CONDITIONAL STEPS</b>	
	<b>Completed On:</b>
<input type="checkbox"/> Demonstrate ergonomic features of workstation.	
<input type="checkbox"/> Update Denver Dashboard (field offices).	
<input type="checkbox"/> Explain the <a href="#">Voluntary Leave Transfer Program</a> .	
<input type="checkbox"/> Review <a href="#">Travel Information</a> (policies, credit card, etc.)	
<input type="checkbox"/> Apply for <a href="#">Citibank Government Card</a> and review misuse policies.	
<input type="checkbox"/> Review <a href="#">Employees with Disabilities</a> website.	
<input type="checkbox"/> Review <a href="#">Advisory Groups</a> website.	
<input type="checkbox"/> Prepare local orientation packet.	
<input type="checkbox"/> Provide orientation to the neighborhood.	
<input type="checkbox"/> Review <a href="#">RO Correspondence Guide</a> .	
<input type="checkbox"/> Obtain Frank Hagel Federal Building <a href="#">Credential/Parking Permit</a> .	

## ONLINE TRAINING RESOURCES

The following are suggested online training resources to share with your new employee. To find additional online training resources, you can access the [Video On Demand](#) site and then search by National, Regional or Component content.

- [Disclosure of Information](#)
- [Employee Ethics Training](#)
- [Field Office Employee Orientation](#)
- [HSPD-12 Information](#)
- [No FEAR Act](#)
- [Orientation to SSA Systems](#)
- [Outlook 2010](#)
- [PACS - Overview \(Section1 of 7\)](#)
- [PACS - Overview \(Section1 of 7\)](#)
- [Privacy and Disclosure](#)
- [The Hatch Act](#)