

Orientation Plan Checklist

Secretarial Orientation Plan Checklist			
(Employee/Supervisor initial and date upon completion of activity)			
Activity	Employee	Supervisor	Date
Become familiar with ARS' mission			
Become familiar with ARS' organization			
Become familiar with location of ARS' offices, programs, and personnel			
Telephone Techniques			
Use of telephone equipment			
Procedures for answering telephone and placing outgoing calls			
Procedures for screening and routing incoming calls			
Introduction to ARS and outside agency telephone books			
Office Essentials			
Timekeeping (leave slips and timesheets)			
Procurement requests			
Training forms			
Personnel Action forms			
Travel			
Arrangements (vendor numbers, travel authorization)			
Airline tickets (ordering and pickup)			
Advance of funds and registration fees			
Vouchers and claims for reimbursement			
Government credit card application			
Correspondence			
Become familiar with Correspondence Handbook			
Routing procedures and location mail codes			
Copies (official file, etc.)			
Identify applicable software packages			
Identify Help contacts			
Supplies			
Location and how to order supplies			
Copies			
Where copiers are located/procedure for duplication services			
Where to get paper supplies			
Who to call for repairs/service			
Mail Distribution			
Location of mailroom			
FAX machine (location and telephone numbers)			
Procedure for sending and receiving FAX messages			
Pouch mail/interoffice mail/overnight mail delivery			
Congressional, Freedom of Information, and recorded mail			

Secretarial Orientation Plan Checklist

(Continued)

Activity	Employee	Supervisor	Date
Meetings and Conferences			
Location, availability, and reservations for conference rooms			
Procedures for setting up meetings			
Arrangement of conference calls			
File System			
Agency file system/office file system			
Reinforcement of Checklist			
Introduction to office protocol and procedures, i.e., work schedules, sick leave, office organization, staff meetings			
Reference organizational charts, supply/communication center procedures, health/security procedures			
Individual Development Plain (IDP)			
Develop IDP for training needs			
Classroom training should cover the topic areas identified			
Other			
Safety			
Ethics			
EEO/CR requirements			
Outside employment (Form 101)			

Upon completion, staple this checklist to the supervisor's copy of the employee's current performance standards and their Individual Development Plan.