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Office of the County Assessor
Employee Orientation Checklist

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Employee: _____

Employee No.: _____

Supervisor: _____

Date of Hire: _____

- Week 1 – HR orientation/Admin orientation/Office tour/Building tour/Meet staff/Organize work area/Read manuals
- Week 2 – Records & Appraisal orientation/Read manuals
- Week 3 – Front desk/Customer service/Read manuals
- Week 4 – Read manuals; (Appraisers) Mentor/Senior appraiser
- Week 5 – (Appraisers) Sales verification/Property inspections
- Week 6 – (Appraisers) Formalize work plan & field assignment

<u>Week</u>	<u>Administrative Orientation</u>	<u>Presenter</u>	<u>Employee Initials & Date</u>	
1	Work station assignment	Peacock	_____	_____
1	Computer set-up/Email	Peacock	_____	_____
1	Telephone/Voice mail	Peacock	_____	_____
1	Internet/Email policy & set-up	Peacock	_____	_____
1	Desk supplies	Peacock	_____	_____
1	Business cards	Peacock	_____	_____
1	Name plate	Peacock	_____	_____
1	Payroll	Peacock	_____	_____
1	Department coordinator (misc.)	Peacock	_____	_____
1	ID card/Key card	Peacock	_____	_____
1	Safety/Fire evacuation	Peacock	_____	_____
1-4	County Policies & Procedures	read online	_____	_____
1-4	HR Policy Handbook	read online	_____	_____
1	Location of HR Policy Handbook	Peacock	_____	_____
2	OCA Operational Guidelines	read OCA manual	_____	_____
1	Benefits	HR orientation	_____	_____
1	Sexual harassment	HR orientation	_____	_____
1	County orientation	HR orientation	_____	_____

<u>Week</u>	<u>OCA Orientation</u>	<u>Presenter</u>	<u>Employee Initials & Date</u>	
1	Office tour/Meet staff	Supervisor	_____	_____
1	Building tour	Supervisor	_____	_____
2	OCA mission statement/Function/Goals	Supervisor	_____	_____
2	OCA management plan	Supervisor	_____	_____
2	Organization chart/Team's role	Supervisor	_____	_____

<u>Week</u>	<u>Supervision/Standards</u>	<u>Presenter</u>	<u>Employee Initials & Date</u>	
2	Role of supervisor	Supervisor	_____	_____
2	Communication (employee and supervisor)	Supervisor	_____	_____
2	Employee's class specification	Supervisor	_____	_____
2	Performance plan/Assessment	Supervisor	_____	_____
2	Employee's expectations & concerns	Supervisor	_____	_____
2	Training/Development/Career path	Supervisor	_____	_____
2	Daily work schedule	Supervisor	_____	_____
2	Stats/Reporting	Supervisor	_____	_____

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<u>Week</u>	<u>Records Orientation</u>	<u>Presenter</u>	<u>Employee Initials & Date</u>	
2	Role of Records team (inc. Land Book)	Wiggins	_____	_____
2	CARAT security	Sanderson	_____	_____
2	CARAT reports database	Sanderson	_____	_____
2	Access reports training & set up	Sanderson	_____	_____
2	GIS maps contact	Sanderson	_____	_____
2	Title/Transfers/Courts	Shifflett	_____	_____
2	Mapping/GIS	Shifflett	_____	_____
2	CARAT/Mapping/Sell-offs	Shifflett/Forsch	_____	_____
2	Easements	Forsch	_____	_____
2	Data entry/New construction	Forsch	_____	_____
2	Addresses (property & mailing)	Forsch	_____	_____
2	Scanning	Forsch	_____	_____
2	Assessment changes	Ensele	_____	_____
2	OCA & BOE hearings	Ensele	_____	_____
2	Privacy on website	Ensele	_____	_____
2	Sale of RE data	Ensele	_____	_____
2	Clerk's Online Deed System (if applicable)	Ensele	_____	_____
2	Building permits	Ceremele/Jackson	_____	_____
2	Motor pool/Fuel ID	Burns	_____	_____
3	Front desk/Customer service	Ensele/Essiaw/Burns	_____	_____
3	FOIA	Peacock	_____	_____

<u>Week</u>	<u>Appraisal Orientation</u>	<u>Presenter</u>	<u>Employee Initials & Date</u>	
2	Permits	Supervisor/Sr. Appraiser	_____	_____
2	Splits/Combos	Sr. Appraiser/Shifflett	_____	_____
2	CAMA/Data entry	Sr. Aprsr/Sanderson/Forsch	_____	_____
2	Land Use/Exemptions	Burns/Sanderson/Supervisor	_____	_____
2	Residential assessments overview	Stober/White	_____	_____
2	Commercial assessments overview	Nelson	_____	_____

For Appraisal Staff Only:

<u>Week</u>	<u>Appraisal Orientation</u>	<u>Presenter</u>	<u>Employee Initials & Date</u>	
2	Work processes/Work reports	Supervisor	_____	_____
2	Reassessment	Supervisor/Sr. Appraiser	_____	_____
2	Vehicles/Parking/Care	Supervisor	_____	_____
4	Mentor/Sr. Appraiser/Field assignment	Supervisor	_____	_____
4	Reviews/Board/Court	Supervisor/Sr. Appraiser	_____	_____
5	Sales verification/MRIS/Classification	Supervisor/Sr. Appraiser	_____	_____
5	Property inspections	Supervisor/Sr. Appraiser	_____	_____
6	Formalize work plan/Field assignment	Supervisor	_____	_____

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Employee: _____

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Supervisor: _____

Date of Hire: _____

I hereby certify that I have completed all items on the Employee Orientation Checklist, including:

- Administrative orientation
- Records orientation
- Appraisal orientation
- I have read the Office of the County Assessor Operational Guidelines
- I have read the Loudoun County Policies and Procedures manual
- I have read the HR Policy Handbook

Employee Signature

Date

Supervisor Signature

Date

NOTE: Return signed copy to Admin Manager upon completion.