

Department-level - New Employee Onboarding / Orientation Checklist

This form can be found at: <http://odt.uoregon.edu/neo/gettingstarted> - New Employee Checklist

Orienting/Mentoring new employees is the process of sharing information to grow confidence and competence in navigating a new work culture. This process engages the employee in five clear stages that include:

1. checking assumptions against a vast amount of information about the organization and department;
2. testing understanding of that information;
3. challenging norms (what is important to the department) to see what is possible;
4. evaluating “fit” – making a decision to invest in the department, or to leave
5. acculturation – becoming an informed participant/partner in furthering the work of the department

When done successfully, a seamless transfer of knowledge moving uninformed outsiders forward to become informed participants in the organization.

Review the following checklist to identify steps you will take to effectively onboard / orient new employees you supervise.

The **Department-level New Employee Onboarding/Orientation Checklist** is comprehensive. In it you will be able to identify activities that, when practiced, will help ensure a seamless transition of a new employee into an informed and equipped employee.

It is divided into 7 essential sections:

1. Pre-arrival
2. First day
3. First week
4. First month
5. First 90 days
6. One month prior to the end of trial service
7. After successful completion of trial service

The kind of commitment I find among the best performers across virtually every field is a single-minded passion for what they do, an unwavering desire for excellence in the way they think and the way they work. Genuine confidence is what launches you out of bed in the morning, and through your day with a spring in your step.

Jim Collins

HUMAN RESOURCES, PROFESSIONAL DEVELOPMENT

5210 University of Oregon, Eugene OR 97403-5210 T (541) 346-3159 F (541) 346-2548 <http://odt.uoregon.edu>

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Department-level New Employee Onboarding/Orientation Checklist

The purpose of this checklist is to help departments prepare an orientation / manageable mentoring approach for new employees and to assure employees designated to participate in the New Employee Orientation are aware of their roles and the content to be shared while in that role.

If you are interested in creating a NEO Checklist for your unit, a blank, fillable worksheet can be found at: <http://odt.uoregon.edu/neo/gettingstarted> - New Employee Checklists – Creating a Department Level NEO Checklist

PRE-ARRIVAL	Who	Date Completed
<p>SECTION A COMMUNICATE CRITICAL INFORMATION</p> <ol style="list-style-type: none"> 1. Confirm hire with departmental personnel/payroll facilitator 2. Send a “Welcome letter” confirming <ol style="list-style-type: none"> a. position, b. title c. salary, d. starting date and location e. Supervisor’s name. 3. Schedule Benefits orientation: https://forms.hr.uoregon.edu/forms/forms/benefits-orientation-sign 4. Send an internal message to the department announcing the new hire. 	<ul style="list-style-type: none"> • Supervisor • Payroll • Personnel 	
<p>SECTION B PREPARE THE WORK AREA</p> <ul style="list-style-type: none"> • Clean and stock • Office supplies • Keys and building access • Telephone (Long Distance) – http://telecom.uoregon.edu/forms/forms.html <p>SECTION C ASSEMBLE THE NEW EMPLOYEE PACKET</p> <ol style="list-style-type: none"> 1) Welcome letter from Department or College <ol style="list-style-type: none"> a) Department Culture b) Department or College Information c) List of current departmental projects or priorities 2) Organizational chart(s) <ol style="list-style-type: none"> a) Department relationship to University as a whole b) Reporting relationship (Supervisor) c) Department Phone List- http://uoregon.edu/findpeople/ 	Supervisor designee	

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<p>SECTION C – Continued</p> <p>3) Payroll and Personnel</p> <ul style="list-style-type: none"> a) Position Description b) Compensation c) Work Hours d) Trial Service- http://hr.uoregon.edu/recruit/trial-classified.html e) Performance Appraisal- http://hr.uoregon.edu/employee-labor-relations/performance-management f) Employee Assistance Program– http://www.cascadecenters.com/index.php?tray=topic&tid=top10557&cid=26 g) Equal Opportunity and Non-Discrimination- http://aaeo.uoregon.edu/ h) Date of first paycheck - https://ba.uoregon.edu/content/paydays <p>4) Access (directions)</p> <ul style="list-style-type: none"> a) UO ID and Duck Web - https://it.uoregon.edu/duckid b) Internet access - http://ns.uoregon.edu/index.html c) Telephone - http://telcom.uoregon.edu/ d) Email - http://it.uoregon.edu/help/email/ e) Policies and procedures: Policy Library – http://policies.uoregon.edu f) Facilities and supplies <p>5) Navigational support (how to get around campus)</p> <ul style="list-style-type: none"> a) Campus map – http://www.uoregon.edu/maps/ b) Inclement weather plan – http://hr.uoregon.edu/policies-leaves/inclement-weather c) Parking and transit options - https://parking.uoregon.edu/ d) Emergency procedures - http://emc.uoregon.edu/ e) Department Standard Operating Procedures Manuals (SOP's) f) Directories - http://uoregon.edu/findpeople 	<p>Supervisor designee</p>	
<p>SECTION D</p> <p>CREATE THE ACTION PLAN FOR THE EMPLOYEE’S FIRST DAY</p> <ol style="list-style-type: none"> 1. Getting Photo Identification Card 2. Claiming Information Services Accounts (email) 3. Arranging introductions and meetings 4. Identifying meaningful work assignment 5. Scheduling campus New Employee and Benefits Orientations with Human Resources 6. Select a Mentor/Job Coach, or create a mentoring group (See Appendix A) 		

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FIRST DAY	Who	Date Completed
<p>SECTION E CREATE A WELCOMING ENVIRONMENT</p> <ol style="list-style-type: none"> 1. Greet the new employee and introduce the employee to co-workers and work area 2. Review position description 3. Complete the Hire Packet <ol style="list-style-type: none"> a. Review onboarding information in MyTrack. 4. Present the pre-prepared New Employee Packet including mission, goals, values, compensation, pay dates, leaves, holidays, collective bargaining agreement, etc. <ol style="list-style-type: none"> a. Collective Bargaining Agreements: http://hr.uoregon.edu/employee-labor-relations/uo-bargaining-units-cbas 5. Introduce the new employee to their mentor/job coach, and/or mentoring group and explain the relationship to both parties 6. Review the first work project 7. Review training schedule 8. Schedule the first performance feedback session <p>INITIATE EMPLOYEE ACCESS ACTIVITIES</p> <ol style="list-style-type: none"> 1. Send new employee to get photo identification card http://uocard.uoregon.edu/ 2. Send employee to get office and building key card access- http://police.uoregon.edu/key-issue 3. Assist the new employee in claiming computing accounts from Information Services (an email account from IS - https://it.uoregon.edu/duckid 4. Ensure their phone number is working 5. Ensure procurement card training and signature authorization paperwork are in order as needed (if applicable) 6. Confirm with Personnel Payroll Facilitator when the employee will receive their first paycheck https://ba.uoregon.edu/content/payroll-overview 	Supervisor	

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FIRST WEEK	Who	Date Completed
<p>SECTION F BUILD TRUST, CLARIFY EXPECTATIONS, PROVIDE LEARNING EXPERIENCES</p> <ol style="list-style-type: none"> 1. Confirm attendance at the New Employee and Benefits Orientations with Human Resources 2. Review training plan with new employee <ol style="list-style-type: none"> a. Banner (FIS, SIS, HRIS) Training http://bg.uoregon.edu/content/banner-training b. Procedural Training c. Core Office Training d. Interpersonal Skills Training - http://odt.uoregon.edu e. Leadership and/or Management skills Training f. Other 3. Review the department or college structure and priorities including the <ul style="list-style-type: none"> ▪ Vision/mission/goals ▪ Department organization chart ▪ Department map ▪ Lists of departmental projects and priorities ▪ The new employee's working relationship with the other roles in the department 4. Describe customer service expectations 5. Describe what will be the basis for performance evaluations: http://hr.uoregon.edu/employee-labor-relations/performance-management <ol style="list-style-type: none"> a) Faculty Performance Review b) OA Performance Evaluation c) SEIU Performance Review 	Supervisor with Human Resources	

FIRST MONTH	Who	Date Completed
<p>SECTION G CHECK PROGRESS</p> <ol style="list-style-type: none"> 1. Meet bi-weekly with the new employee to answer questions and ensure the new employee is becoming acclimated to the department or college as well as to their new position. 2. Review knowledge/skills analysis instrument with employee to identify training. Contact Professional Development to schedule trainings: 6-3159 or hrodt@uoregon.edu 3. Discuss the guiding principles and how the new employee has seen them "in action" within the department or college. 4. Record and research the answers to the new employee's questions. 5. Respond to the new employee in a thoughtful and timely manner. 	Supervisor	

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FIRST 90 DAYS	Who	Date Completed
SECTION H SET PERFORMANCE GOALS FOR REMAINDER OF PROBATIONARY PERIOD <ol style="list-style-type: none"> 1. Establish performance goals with the new employee 2. Set a schedule of meetings to review the new employee's progress in meeting the performance goals 	Supervisor/ Manager	

ONE MONTH PRIOR TO THE END OF TRIAL SERVICE (Classified employees) OR PRIOR TO THE END OF THE INITIAL 6 MONTHS (Unclassified employees)	Who	Date Completed
SECTION I CONDUCT PERFORMANCE APPRAISAL <ol style="list-style-type: none"> 1. Discuss performance with the new employee 2. Conduct a performance evaluation <i>(required for Classified Employees – SEIU Collective Bargaining Agreement)</i> <ol style="list-style-type: none"> a. Classified (non-IT): http://hr.uoregon.edu/classification-compensation/performance-appraisals/classified-performance-evaluation-instructions b. Classified (IT): http://hr.uoregon.edu/records/performance-appraisals/attachments/it-performance-appraisal-instructions 3. Set a plan for professional development or, discuss separation from trial service with Employment Manager in Human Resources 	Supervisor / Manager in partnership with HR Employee and Labor Relations	

AFTER SUCCESSFUL COMPLETION OF TRIAL SERVICE	Who	Date Completed
<ol style="list-style-type: none"> 1. Celebrate the completion of the trial service period <ol style="list-style-type: none"> a. Vacation leave available b. Personal leave available 2. Regularly review the progress of the employee 3. Provide development opportunities - 	Supervisor / Manager	

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Appendix A – Mentoring Group Forum

Two approaches:

1. **Mentor and Job Coach Criterion:** Consistently demonstrates high performance, has time to commit to new employee, is skilled in the area of the new employee's position, is a peer of the new employee, has good communications skills, wants to participate as a mentor or job coach, is a positive role model, has been selected and trained as a mentor or job coach in advance.
 - **Mentor and Job Coach Responsibilities:** Acts as an information resource, helps socialize the new employee, assists in training the new employee, acts as a guide, helps identify resources, provides instructions, gives informal feedback.
2. **Mentoring Group:** Create a group meeting for new employees to gain important information, ask questions, and build a network of colleagues in your department. This group can be limited to new employees, or be opened to employees who have been in the department for 2 or fewer years.
 - **Mentoring Group Responsibilities:** Have a focus for the meetings, and identify key topics that will help the new employees navigate the new culture, policies and procedures, and technology. Identify speakers within the university that can provide useful information. These presentations must be engaging, informative, and feel safe, creating a “place to be” experience for the new employees.

A Mentoring Group Forum is a manageable way to orient new or existing employees to their new position, department, and to the University of Oregon as a whole...

The purpose of a mentoring group

- Share information
- Acclimate the new employee,
- Assist in training the new employee
- Help identify resources
- Provide instruction
- Provide access to a network of colleagues

Composition of the mentoring group

- A mix of new employees and employee's that have been here 2 or 3 years. After the first year the new employees graduate to being the mentors.

The power of this approach

- When done successfully, a seamless transfer of knowledge moving uninformed outsiders forward to become informed participants in the organization.

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Possible group topics to consider

- University mission statement / goals
- CODAC
- Professional Development/Training – Needs vs preparation gap analysis
- BAO Policies and Challenges
- Scavenger hunt for places/departments around campus that may be of assistance to them....BAO, HR/Professional Development, EMU (meeting rooms), Rec Center, Craft Center, UO Book Store, Info Services, Hayward Field, Autzen Stadium, etc.
- Employee Assistance Program (EAP) and what is available
- Holiday cultures
- Campus calendar
 - Academic calendar
 - Professional development / training calendar
- Transportation services
- Other?

In selecting speakers the following criteria should be considered:

- Is this person a high achiever?
- Does this person have relevant subject matter expertise?
- Does this person have good communication skills?
- Is this person a positive role model?
- Has this person been trained as a peer mentor?