Onboarding Best Practices for HR Partners

November 20, 2019

Welcome!

Agenda:

- Onboarding Resources
  - Nancy Nieraeth, Director, Talent Acquisition
  - Jenna Rakes, Associate Director, Talent Acquisition

- Onboarding Best Practices for HR Partners
  - Connie Brady, Associate Dean for Finance and Administration, LCB
  - Jared Haddock, Associate Director HR & Admin. Ops, Info. Svc.
  - Jessica Marquez, HR Manager, Knight Campus

- Q & A

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Onboarding Resources

Nancy Nieraeth, Director, Talent Acquisition

Jenna Rakes, Associate Director, Talent Acquisition

on·board·ing

änˈbôrdiNG/

noun

the action or process of integrating a new employee into an organization or familiarizing a new customer or client with one's products or services.

Why Onboarding Matters

- First impressions
- Commitment to success
- Effective working relationships
- Communication of core values and expectations
- Key transactions

Onboarding Resources

- Employee Onboarding Portal
  - Content duplicated on HR Website: https://hr.uoregon.edu/new-employees
- Onboarding Guide for Supervisors
  - https://hr.uoregon.edu/recruitment/orientation-onboarding/orientation-onboarding-guide-supervisors
- Onboarding Checklists
  - https://hr.uoregon.edu/recruitment/orientation-onboarding/onboarding-guide-supervisors/new-employee-onboarding-checklists
  - Includes one for Faculty and one for Classified/OA

Employee Onboarding Portal

Welcome	Get Started	Community & Relocation Resources

TASK LIST

▲

First day

☐ **Set up your voicemail** Due: 4 Nov 2019

Employee Onboarding Portal

- Welcome Page:
  - Welcome from President Schill
  - Overview of UO/link to UO Values and Mission
  - Overview of UO Community/link to Diversity at UO
  - Welcome Video
  - Link to UO App
  - Task List

Employee Onboarding Portal

- Getting Started
  - UO ID and PAC
  - DuckID and Password
  - Technology Assistance
  - ID Card
  - Benefits
  - Leave Time
  - Orientations
- Learning and Development
- Keys
- Parking
- Payroll
- Transportation Options
- Faculty Considerations

Employee Onboarding Portal

- Community and Relocation Resources
  - Description of Eugene
  - Resources to Explore
  - Family Resources
  - Relocation Resources

Managing Onboarding Task Lists

- User Guide on our website:

Onboarding Resources – HR Website

Orientation & Onboarding of New Employees

Orienting and onboarding new employees to the university and to their positions during the first few months of their employment is critical to establishing successful, productive working relationships. Both the employee and the supervisor play key roles in effective orientation and onboarding. Human Resources provides tools and guidance to help employees and supervisors navigate the onboarding process.

| Resources for New Employees | Guide for Supervisors |

Onboarding Checklist:
All New Hires

New Hire Name:_____   Start Date:_____

This checklist provides general guidance and captures onboarding and orientation action items that are applicable campus-wide for all new hires. This is an optional resource intended for use by a department representative. It is not intended to be given directly to a new hire. It is customizable, so you can edit and add to this list as appropriate for your department or unit.

Step 1: Set-up New Hire

The following steps must be completed in order to create an employment record in Banner and provide the new hire with access to technology. Refer to the New Hire Setup Process Guide for more information:

○ Employment offer accepted by new hire in MyTrack

○ Employee Information Form/New Starter Form completed by new hire

○ 95# established

○ PAC (Personal Access Code) setup

○ Duck ID claimed by new hire

Step 2: Prepare for New Hire Arrival

○ ***Provide new hire with important information***
Call or send a welcome letter to new hire to provide important information, such as:
- Confirm new hire's start date and where, when, and with whom to meet on their first day.
- Share transportation options and where to park on the first day. Provide parking website: https://parking.uoregon.edu/.
- Provide dress code information.
- What to bring on the first day, such as Form I-9 and work eligibility documents (list of eligible documents on last page of Form I-9).
- Share onboarding resources located on the New Employees tab on the HR website, including relocation, community, and benefits information, as appropriate.
- Share useful website links about your department/unit and the UO.

Onboarding Checklist:
Faculty

New Faculty Member Name:_____ Start Date:_____

This checklist provides general faculty specific items for your consideration. This is an optional resource intended for use by a department representative. It is not intended to be given directly to a new hire. These items may be adjusted as necessary or completed by various people as assigned within the department, school, or college. It is customizable, so you can tailor the list to meet your department/unit practices.

Faculty Support	Notes
⭘ Review resources available through the Office of the Provost.	
⭘ Assist with accessing Canvas; share Center for Media and Educational Technologies (CMET) resources.	
⭘ Discuss syllabus requirements and grading culture.	
⭘ Direct to Emergency Management resources for faculty.	
⭘ Introduce to the Teaching Engagement Program.	
⭘ Set up faculty profile.	
Fiscal Operations	**Notes**
⭘ Discuss faculty funding [Academic Support Account, Start up, UMRP (under-represented minority recruitment program), IFD (initiative for faculty diversity], Vice President for Research and Innovation – award funding).	

Proactive Onboarding

- Whether faculty or staff, hiring is exciting and we invest a lot of time into the selections being made

- Effective onboarding starts with recruitment

- The four "Cs" - Clarification, Compliance, Culture and Connection

The Four "Cs"

- Clarification
  - ensure potential/new employee understands job
- Compliance
  - ensure potential/new employee understands basic policies

The Four "Cs"

- Culture
  - ensure potential/new employee understands organizational norms
- Connection
  - ensure potential/new employee has opportunity to connect

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Faculty Onboarding

- Recruitment Process
  - Communication during the search process should convey "it is always a great day to be a duck"
- Interview Process
  - Itineraries
    - Build in time to see area and campus
    - Build in time to connect with others

Faculty Onboarding

- Checklists
- Connection with department heads
- Connection with other faculty members
- Campus Resources
- Expectations
- Faculty Orientation (College level)

New Faculty Orientation

Faculty Support
A team of college support specialists is available to help you with many tasks from preparing exams, proofreading, travel assistance, and much more.

Fiscal Services
Find information on what financial support resources are available as well as important guidelines.

Student Advising
Student advising procedures and information including waitlists, over enrolling, honors registration, incompletes, mandatory attendance, checking or waiving pre-requisites, testing accomodations, student concerns, and more.

Technology
Services provided by the Business Technology Center (BTC), Lillis classroom how-to, and general classroom technology overview.

Canvas FAQ
Getting started with Canvas Learning Management System.

Teaching Engagement Program
Everything you need to know about experiential learning at Lundquist.

Library Resources
See what the UO Library has to offer. If the UO Library doesn't have what you need, materials can be ordered from other summit Libraries.

Instructional Policies
Policies and guidlines to assist you in the instruction and support of your students.

HR

Operational Integration

- Functioning workplace
  - Office Location
  - Furniture
  - Equipment
  - Copy codes
  - Keys
  - Other tools

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Process Description

Process Tasks

Task			
1	Initial New Hire Operations	1 Contact Employee for Equipment Choices	IT-Helpdesk
		2 Indicate Equipment Choices	Employee
		3 Update DuckID	Administration
		4 Provide Equipment Billing Index	Fiscal
		5 Provide Copy/Printing Information	Fiscal
		6 Order Keys	Building Management
		7 Order Employee Equipment	IT-Helpdesk
		8 Order Telephone	Building Management
		9 Pickup Keys/Prox Card	Employee
		10 Update Locknetic/Building Access Codes	Building Management
		11 Add Employee Mailbox	Faculty Support
		12 Create Digital Measures Record	Information Services
		13 Update Employee Phone in Duckweb	Employee
		14 Review CV For Accreditation Purposes	Deans Office
2	Prepare Employee Office	1 Paint Room	Building Management
		2 Order Employee Furnishings	Building Management
		3 Prep Layout of Room	Building Management
		4 Create/Install Door Sign	Communications
3	Setup Employee Computing Accounts/Access	1 Setup Employee Data Access/Accounts	Systems
		2 Setup Access to Online Systems	Information Services

Process Data-Items

	Data-Item
1	Employee's Pre-Hire Email Address
2	Employee UOID
3	Destination Room
4	Employee Start Date
5	Employee Arrival Date
6	Faculty Starting CV
7	Employee Supervisor

Create Activity Insight Record	Information Services	Completed: 8/16/2019 2:47:11 PM Completed By: cnf	✓ COMPLETE	✏
Update Employee Phone in Duckweb	Employee (emoore12)	Sent: 8/14/2019 1:42:05 PM Resend Notifications ✉	⚙ IN PROGRESS	✏
Review CV For Accreditation Purposes	Deans Office	Completed: 8/14/2019 3:08:20 PM Completed By: cortneym	✓ COMPLETE	✏

Prepare Employee Office

Sub-Task	Responsibility	Notified/Completed	Status	
Paint Room	Building Management	Completed: 8/15/2019 7:37:47 AM Completed By: fsharpy	✓ COMPLETE	✏
Order Employee Furnishings	Building Management	Completed: 8/15/2019 7:37:55 AM Completed By: fsharpy	✓ COMPLETE	✏
Prep Layout of Room	Building Management	Completed: 8/15/2019 7:37:59 AM Completed By: fsharpy	✓ COMPLETE	✏
Create/Install Door Sign	Communications	Sent: 8/14/2019 1:42:06 PM Resend Notifications ✉	⚙ IN PROGRESS	✏

⚙ IN PROGRESS

Setup Employee Computing Accounts/Access

Sub-Task	Responsibility	Notified/Completed	Status	
Setup Employee Data Access/Accounts	Systems	Completed: 9/26/2019 1:17:02 PM Completed By: chris	✓ COMPLETE	✏
Setup Access to Online Systems	Information Services	Completed: 8/16/2019 2:47:15 PM Completed By: cnf	✓ COMPLETE	✏

✓ COMPLETE

Prepare Employee Computing Needs

Sub-Task	Responsibility	Notified/Completed	Status	
Inventory Equipment	IT-Helpdesk	Completed: 9/27/2019 9:56:44 AM Completed By: karlo	✓ COMPLETE	✏
Image Employee Equipment	IT-Helpdesk	Completed: 9/27/2019 9:56:49 AM Completed By: karlo	✓ COMPLETE	✏
Personalize Employee	IT-Helpdesk	Completed: 9/27/2019 9:56:54	✓	

✓ COMPLETE

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Onboarding Best Practices

Jared Haddock, Associate Director for HR
and Administrative Operations
Information Services

First Impressions

Welcoming

- Announcement Email To Staff
- Welcome Email to Employee
- Orientation with IS HR
- Pin on the World Map
- 30, 60, 90 Day Plan
- Training Overview

Partnerships

- Eugene Chamber of Commerce

- UO Rec Center

- UO Human Resources

- Vendors

Onboarding Supervisors

- Expectations of a supervisor
- MyTrack supervisor training
- Employee evaluation overview
- Direct report roster
- 3-month follow up

Onboarding Best Practices

Jessica Marquez, HR Manager
Knight Campus for Accelerating
Scientific Impact

Building Relationships

- Kickoff with KC HR
- Onboarding Buddy
- Lunch Meet and Greet
- Meetings with Campus Partners
- Orientations with Operations Team

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Tools to Get Started

- Trello Board Shared with Supervisor
- Community of Practice Connections
- Confluence References

Onboarding Template   Personal   Private   JM   Invite   ☁ Butler (1 Tip)   ··· Show Menu

Onboard tasks ···

FIRST DAY - MONDAY, JUNE 17th!

Share calendar with KCstudent, Naomi, Julie, Theresa, Valerie, Jessica, Moira, Lori

Create a short bio for our Knight Campus website

Look at Timesheet and Review (See General Documents)

KC Office Procedures/How-To's That May Be Helpful
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Download/Create Slack account

Google and Trello Account

Keys

Setup Voicemail

Gain access to the KC shared drive

+ Add another card

Trainings ···

UO Workplace Safety

Workplace Harassment and Discrimination Training

Banner FIS/ HRIS

+ Add another card

Contact Info ···

Phone Extensions

Cell Phone Numbers

Naomi Crow

Julie Langenberg

Moira Kiltie

Other Employees
📎 1

+ Add another card

General Information ···

Timesheet

Procedures
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Document Tracking
🗐 📎 1

KC Shared File Access

Conference Call Line

Downloading/Installing software/etc.

Knight Campus Org Codes
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Ergonomic Assessment

+ Add another card

Student Help ···

Student Capable Tasks

Assigning tasks to students

Requesting Use of Conference Rooms

Ordering Materials

+ Add another card

Completed Tasks ···

+ Add a card

+ Add another list

Q & A

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Thank you for attending.