

Onboarding Best Practices for HR Partners – Part 2

February 26, 2020

Agenda:

- Onboarding Resources
Jenna Rakes, Associate Director, Talent Acquisition
- Onboarding Buddy
Jessica Marquez, HR Manager, Knight Campus
- Table Discussions and Report Out

Onboarding Resources

Jenna Rakes, Associate Director, Talent Acquisition

Three MyTrack Onboarding Roles

- Supervisor
 - Noted on Offer Card from Position Description
- Onboarding Delegate
 - Entered on Offer Card
- Employee

Supervisor
Name:*

Peggy Carter



Name: Peggy Consultant Carter



Onboarding
Delegate:

Supervisor Maximoff



Name: Supervisor Wanda Maximoff



*All three of these roles are test accounts in this presentation.
You will notice odd dates, mismatched statuses, etc. in these tests.
Functionality will be the same.*



Supervisor's View

- Supervisors access new hires and onboarding tasks via the “Offers” card on their dashboard



Offers

0 Offers awaiting
your approval

1 New hires

15 New hire tasks

My new hires

Applicant name	Job No.	Job title	Application status	
Jessica Drew	522242	Office Specialist 2	New	View all tasks



New hire tasks

Jessica Drew

Position
Office Specialist 2

Start date
Feb 24, 2020

Notify updates

Add optional tasks



No tasks

My Favorite Tasks




Assigned to

All tasks

Manager

Employee

Add new task

Task	Assigned to	Due date	Status
Pre-arrival			+ Add
Locate employment eligibility documents	Jessica Drew	06 Jul 2019	Completed
NEW HIRE PACKET	Peggy Carter	18 Feb 2020	Completed
NEW HIRE SETUP PROCESS	Peggy Carter	23 Feb 2020	Open 



Adding Custom Tasks

New task ×

Title*

Group*

Due date
Due time

Description Merge fields

B *I* U ~~S~~ ... ?

- Choose a grouping for your new task
- These are driven from system start date

Select
Pre-arrival
✓ First day
First month

Due date
Due time

New task



Title*

Choose After Hours Building Code

Group*

First day



Due date

Due time

Description

[Merge fields](#)

B *I* U ~~S~~ ...

Please coordinate with the building manager to choose the after hours code to be used in combination with your proximity card

- You can choose who the task is allocated to
- You can add common tasks to a “Favorites” to save time on future hires

Task allocated to*

☐ Both ☐ Manager ☒ Employee

☒ Add to favorites



Added tasks appear in the employee's or manager's list (or both)

Choose After Hours Building Code

Jessica Drew

Open



- You can see who the task is assigned to
- You can edit the task further if needed
- You can delete the task if it is no longer needed

Delete task?



New Favorite Task

Cancel

Delete



Onboarding Delegate's View

- Onboarding Delegates access new hires and onboarding tasks via the “Offers” card on their dashboard
- They may have more than one hire at a time that they are onboarding



Offers

1 Offers awaiting your approval

4 New hires

36 New hire tasks

My new hires

Applicant name	Job No.	Job title ▲	Start date	Application status	
Test Provisioning	519011	PD test for GoLive Run Through	Mar 14, 2017	Interview (Phone)	View all tasks
Jessica Drew	519041	PD test for Faculty Application	Oct 12, 2018	Formal Offer Made	
Natasha Romanova	519040	PD test for Classified Application	Apr 10, 2017	Offer Accepted, Form Complete	View all tasks
Jessica Drew	522242	Office Specialist 2	Feb 24, 2020	New	View all tasks



View by task or by employee

- Clicking directly on new hires from the dashboard will take you to a list of new *employees*.
- Clicking directly on new hire tasks from the dashboard will take you to the *tasks* for ALL new employees assigned.
- Those performing onboarding for multiple hires can further sort the larger task list.
- Onboarding delegates working on multiple hires at one time can batch activities as works best for them.



My new hire tasks

Employee:

- ☐ Jessica Drew
- ☐ Natasha Romanova
- ☐ Test Provisioning

Task:

- ☐ UO ID AND DUCKID
- ☐ UO ID, PAC, AND DUCKID
- ☐ ANNOUNCE NEW EMPLOYEE
- ☐ ASSEMBLE NEW EMPLOYEE WELCOME PACKET
- ☐ Confirm arrival details with supervisor

Clear

Search

Select	Title	Employee	Duck ID	Step due	Supervisor	Job ▲	Start date
<input type="checkbox"/>	I-9 STATUS	Test Provisioning		Mar 12, 201	Supervisor Maximof	PD test for GoLive Run Through	Mar 14, 2017
<input type="checkbox"/>	ASSEMBLE NEW EMPLOYEE WELCOME PACKET	Test Provisioning		Mar 9, 2017	Supervisor Maximof	PD test for GoLive Run Through	Mar 14, 2017
<input type="checkbox"/>	UO ID AND DUCKID	Test Provisioning		Mar 9, 2017	Supervisor Maximof	PD test for GoLive Run Through	Mar 14, 2017
<input type="checkbox"/>	EMAIL ACCESS	Test Provisioning		Mar 9, 2017	Supervisor Maximof	PD test for GoLive Run Through	Mar 14, 2017
<input type="checkbox"/>	SCHEDULE ORIENTATIONS	Test Provisioning		Mar 9, 2017	Supervisor Maximof	PD test for GoLive Run Through	Mar 14, 2017
<input type="checkbox"/>	REVIEW EMPLOYEE WELCOME INFORMATION	Test Provisioning		Mar 14, 201	Supervisor Maximof	PD test for GoLive Run Through	Mar 14, 2017
<input type="checkbox"/>	PREPARE EMPLOYEE'S WORK AREA	Test Provisioning		Mar 9, 2017	Supervisor Maximof	PD test for GoLive Run Through	Mar 14, 2017
<input type="checkbox"/>	ORDER KEYS AND REQUEST BUILDING ACCESS	Test Provisioning		Mar 7, 2017	Supervisor Maximof	PD test for GoLive Run Through	Mar 14, 2017



Sorting by Employee

- Select employee and click “Search” button
- Clear will clear all selections to allow a new search

My new hire tasks

Employee:

☒ Natasha Romanova

☐ Jessica Drew

☐ Test Provisioning

Task:

☐ UO ID AND DUCKID

☐ UO ID, PAC, AND DUCKID

☐ ANNOUNCE NEW EMPLOYEE

☐ ASSEMBLE NEW EMPLOYEE WELCOME PACKET

☐ Confirm arrival details with supervisor



Sorting by Task

My new hire tasks

Employee:

- ☐ Jessica Drew
- ☐ Natasha Romanova
- ☐ Test Provisioning

Task:

- ☒ ORDER KEYS AND REQUEST BUILDING ACCESS
- ☐ UO ID AND DUCKID
- ☐ UO ID, PAC, AND DUCKID
- ☐ ANNOUNCE NEW EMPLOYEE

Clear

Search

Select	Title	Employee	Duck ID	Step due	Supervisor	Job ▲	Start date
<input type="checkbox"/>	ORDER KEYS AND REQUEST BUILDING ACCESS	Test Provisioning		Mar 7, 2017	Supervisor Maximoff	PD test for GoLive Run Through	Mar 14, 2017
<input type="checkbox"/>	ORDER KEYS AND REQUEST BUILDING ACCESS	Natasha Romanov:		Apr 3, 2017	Supervisor Maximoff	PD test for Classified Application	Apr 10, 2017
<input type="checkbox"/>	ORDER KEYS AND REQUEST BUILDING ACCESS	Jessica Drew		Feb 17, 202	Peggy Carter	Office Specialist 2	Feb 24, 2020



You can mark tasks complete individually...

ORDER KEYS AND REQUEST BUILDING ACCESS

Step due: Mar 7, 2017

If you will need physical keys or card access to buildings, please request these items in advance of their start date.

Campus Key Issuance: <http://police.uoregon.edu/key-issue>

Online Key Order Form (requires sign-in): <https://police.uoregon.edu/content/advance-key-order>

Card Access Overview: <http://police.uoregon.edu/access-control>

Card Access Request: <http://police.uoregon.edu/content/card-access-request>


Mark as completed

Close




Or mark them complete with bulk action

- You can click all tasks for an employee, or all of one tasks type, depending how you sorted them
- Click “Bulk Complete” to mark each checked tasks as complete in the system



Bulk Complete

My new hire tasks

 You have not selected any tasks.

Employee:

- ☐ Jessica Drew
- ☐ Natasha Romanova
- ☐ Test Provisioning

Task:

- ☒ C
- ☐ L
- ☐ L
- ☐ A

Select	Title	Employee
<input checked="" type="checkbox"/>	ORDER KEYS AND REQUEST BUILDING ACCESS	Test Provisio
<input checked="" type="checkbox"/>	ORDER KEYS AND REQUEST BUILDING ACCESS	Natasha Ror
<input checked="" type="checkbox"/>	ORDER KEYS AND REQUEST BUILDING ACCESS	Jessica Drew



My Favorite Tasks

- Tasks that you have added to *your* favorite list are available across all hires
- Click the + to add them to a specific person's tasks list
- They can also be edited or deleted from this area

My Favorite Tasks

Choose After Hours
Building Code

Lunch with your
onboarding buddy

Update calendar to add
team meetings



Notify your new hire of updates

- You can use the tasklist to notify your new hire that you've added items
- This email can be edited before being sent

Jessica Drew

Position

Office Specialist 2

Start date

Feb 24, 2020

[Notify updates](#)



Email employee



From*

peggycarter@uoregon.edu

Subject*

Onboarding task updated

Message*

[Merge fields](#)

B *I* U      ... 

Dear Jessica,

This is a notification to advise that some updates have been made to your onboarding task list.

Please login to review the updates.

Regards,


Peggy Carter

Cancel

Send



Employee View

 UNIVERSITY OF OREGON

Employee Onboarding Portal

[Welcome](#)[Get Started](#)[Community & Relocation Resources](#)



TASK LIST



Pre-arrival

- ☒ **Locate employment eligibility documents**
- ☐ Confirm arrival details with supervisor
- ☐ Obtain Personal Access Code (PAC) **Due: 24 Feb 2020**

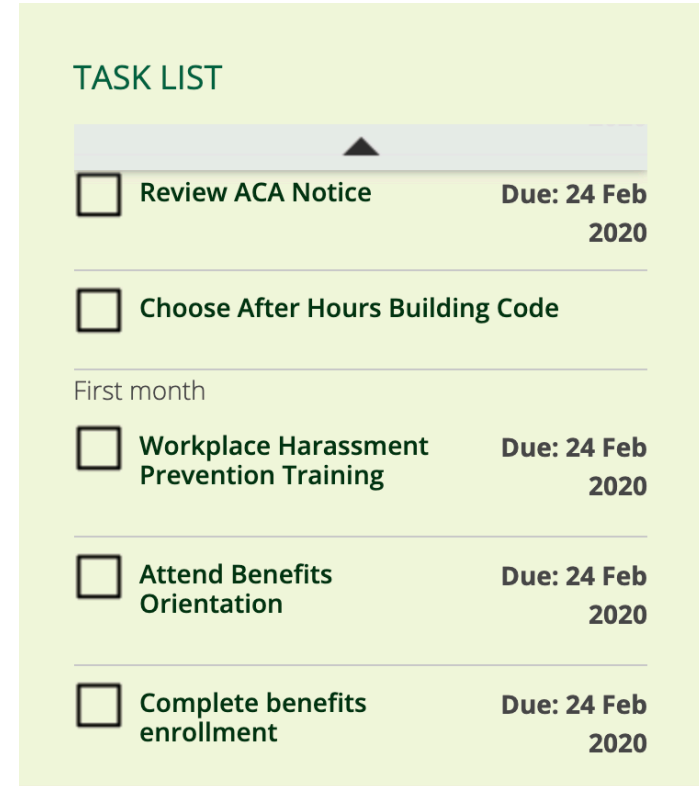
First day

- ☐ **New Hire Forms** **Due: 24 Feb 2020**



Tasks you add appear with UO wide tasks

- Tasks will only show a due date if you added one
- UO wide tasks and unit added tasks appear in the same formatting to new employees



The screenshot displays a 'TASK LIST' interface on a light green background. At the top, the title 'TASK LIST' is in green. Below it is a grey header bar with a small black triangle pointing up. The list contains five tasks, each with a checkbox, a task name, and a due date. The tasks are separated by horizontal lines. The first task is 'Review ACA Notice' with a due date of 'Due: 24 Feb 2020'. The second task is 'Choose After Hours Building Code'. The third task is 'Workplace Harassment Prevention Training' with a due date of 'Due: 24 Feb 2020'. The fourth task is 'Attend Benefits Orientation' with a due date of 'Due: 24 Feb 2020'. The fifth task is 'Complete benefits enrollment' with a due date of 'Due: 24 Feb 2020'. A section header 'First month' is positioned between the second and third tasks.

Task	Due Date
<input type="checkbox"/> Review ACA Notice	Due: 24 Feb 2020
<input type="checkbox"/> Choose After Hours Building Code	
First month	
<input type="checkbox"/> Workplace Harassment Prevention Training	Due: 24 Feb 2020
<input type="checkbox"/> Attend Benefits Orientation	Due: 24 Feb 2020
<input type="checkbox"/> Complete benefits enrollment	Due: 24 Feb 2020



Employees can mark tasks complete too

Choose After Hours Building Code

Step due:

Please coordinate with the building manager to choose the after hours code to be used in combination with your proximity card

[Mark as completed](#)

[Close](#)



Resources outside of MyTrack

- Employee Onboarding Portal
 - Content duplicated on HR Website: <https://hr.uoregon.edu/new-employees>
- New Employee Onboarding Sessions
 - <https://hr.uoregon.edu/learning-development/new-employee-onboarding-program-0>
- 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



NEW! New Employee Onboarding program

New Employee Onboarding Sessions

The New Employee Onboarding program includes the following sessions:

YOU & UO: Orientation to policies, responsibilities, and community standards

Employees learn about the mission, vision, and organization of the University of Oregon with a focus on departments, duties, and responsibilities.

Register for YOU & UO

YOU @ UO: Opportunities and access

Employees discover access to opportunities unique to members of the university community. Being an employee at the University of Oregon has its perks.

Register for YOU @ UO

YOU & Benefits: Employee benefits orientation

For benefit-eligible employees only.

Employees explore university benefit options and the enrollment process.

Eligible employees must select and enroll in benefit plans within 30 days of hire

Register for YOU & Benefits

Please coordinate with your supervisor to make sure the orientation date selected fits with your schedule and your department guidelines. Orientation and Opportunities session registration requires authentication with DuckID and password. If you or your employees are unable to access the schedule or register in MyTrack, please contact Learning and Development at learning@uoregon.edu.



Onboarding Checklists

New Employee Onboarding Checklists for Supervisors

The following checklists help you prepare and plan for a new employee's first days and months of employment and guides you through the onboarding process. The first checklist applies to all new hires regardless of employee type. The other checklists apply to specific employee types and should be used in addition to the checklist for all new hires.

Checklist: All New Hires

Checklist: Faculty

Checklist: Officers of Administration &
Classified Employees



Using Onboarding Checklists

- Checklists can be downloaded to Word
- Many units save a copy and edit it to fit their needs
- You may want to consider different unit level checklists by
 - Division, team, department, etc.
 - Employee type
 - Work performed
 - Building/location



You're not alone in this!

- Talent Acquisition is happy to answer questions and assist you in building your own onboarding initiatives. Don't be shy; call your Buddy!
- Your HR Colleagues have great ideas, solutions, or tips and tricks to build on your onboarding program. We are in this community together.
- It doesn't have to be perfect! Iterations are a great way to expand your onboarding program as you have time and capacity.



Onboarding Buddy

Jessica Marquez, HR Manager
Knight Campus for Accelerating
Scientific Impact

What is a buddy?

- An existing employee who guides the new hire through the first few weeks or months on the job
- An unstructured knowledge share
- Only one part of an onboarding and orientation program



Why use a buddy system?

- Relationships matter – builds a culture of teamwork and openness.
- Onboarding buddies provide context.
- Onboarding buddies boost productivity.
- Onboarding buddies improve new employee satisfaction

Co-worker: Are you okay, you seem a bit stressed.

Me: I don't wanna talk about it.

Me 2 minutes later



How do we select buddies?

- Not a supervisor
- General familiarity with job
- Strong work performance history
- Someone whom others like and respect.

Expectations and Communication

- Lunch with new hire on second day
- Weekly coffee date for first month
- Invites and sits by new hire in meetings
- Available to answer questions or make introductions

Tips for Buddies from PMI

- You are not expected to be an expert on everything.

Use your resources on campus.

- Focus attention on the new employee.

Think about what they need to be comfortable and productive in their new role.

- Remain patient.

Relationships take time to develop.

Tips for Buddies from PMI

- Don't try to cover everything right away.
Remember, the new hire will need time to digest all the information they are taking in.
- Stay positive.
New employees will grow into their roles in time with appropriate support.

Tips for Buddies from PMI

- Don't try to force a relationship.

Be available, but give the new employee time to adjust to you and feel comfortable with using you as a trusted source.

- Try to identify the new employee's personality and communication style.

Try to adapt accordingly.

Tips for Buddies from PMI

- Keep an open mind and don't be too judgmental.

The new hire is relying on you to be a safe place to get answers to their many questions.

- Maintain a positive, teaching attitude.

Table Discussions

1. Table Discussions: (20 minutes)
 - a. What are you currently offering to new employees in the area of orientation and onboarding?
 - b. Are you trying to create anything new?
 - c. What are your needs in this area? From your dept., HR, other?
 - d. What other resources do you utilize that you can share with your table?

Group Share

1. Group Share (10 minutes)
 - a. What are you currently offering to new employees in the area of orientation and onboarding
 - b. Are you trying to create anything new?
 - c. What are your needs in this area? From your dept., HR, other?
 - d. What other resources do you utilize that you can share with your table?

Thank you for attending.