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| **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](https://hr.uoregon.edu/new-hire-setup-process-oa-and-classified-positions.pdf) 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](http://pages.uoregon.edu/baoforms/bao_drupal_6/sites/ba.uoregon.edu/files/forms/i-9.pdf) and work eligibility documents (list of eligible documents on last page of Form I-9). * Share onboarding resources located on the [New Employees](https://hr.uoregon.edu/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. * **Prepare for completion of new hire paperwork** Refer to the new hire packet in the new hire task list in MyTrack. (This is available to both the supervisor and the onboarding delegate.) Determine your unit/department’s process for completing the I-9 and W-4 and plan to complete that process on or before the new hire’s first day, as appropriate for the position. If the process includes the Payroll Office, schedule an appointment for the new hire to go to the [Payroll Office](https://ba.uoregon.edu/content/payroll-administration) on their first day of employment to complete the I-9 and W-4. * **Order/gather office supplies and equipment, as appropriate for the position**  i.e. phone, computer, furniture, desk supplies, business cards, door signs, etc.  If options are available, get new hire’s input on job-related supplies and equipment. * **Set-up workspace** Identify workspace, ensure it is clean, and provide basic supplies * ***Review contingent offer letter*** for any special conditions (i.e. moving expenses, summer bridge appointment, etc.); take appropriate action as needed. * ***Schedule*** [***benefits orientation***](https://hr.uoregon.edu/benefits#orientation)or discuss alternate plan with Benefits Office, if applicable. * ***Plan for introductions*** Identify key colleagues for initial introduction and timing. Schedule welcome activities and meetings accordingly. |
| **Step 3: Onboard & Orient New Hire** *Complete within the* ***first month*** *of employment* |

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| **Essential Actions**   * **Ensure new hire forms are completed** [Form I-9](http://pages.uoregon.edu/baoforms/bao_drupal_6/sites/ba.uoregon.edu/files/forms/i-9.pdf) must be completed no later than the third day of employment.  Direct new hire to follow department process for completion of forms.  Ensure the new hire has their original eligibility documents with them to complete I-9. Refer to the list on the last page of the I-9 form.   [W-4](https://www.irs.gov/pub/irs-pdf/fw4.pdf) should be completed as soon as possible to avoid delays in pay.   * ***Discuss employee benefits, if new hire is eligible*** Inform benefits-eligible new hires of their [benefits orientation](https://hr.uoregon.edu/benefits#orientation) date and notify them they have 30 days from date of hire to select and enroll in the health plans. Coverage is effective the first of the month following their hire date and online enrollment or submission of enrollment forms to the UO Benefits Office. If they have questions about [UO Benefits](https://hr.uoregon.edu/hr-programs-services/benefits/new-employee-benefits-resource-center), please have them contact the [Benefits Team](https://hr.uoregon.edu/hr-programs-services/benefits/contact-benefits-team). * ***Get UO ID*** Direct new hire to the [UO Card Office](https://emu.uoregon.edu/card) in the Erb Memorial Union to pick up their UO ID. Ensure new hire has a photo ID and their UO 95# with them when they go.  *If key or key card access is needed, complete the next task before sending the new hire to the Card Office.* * ***Provide access to workspaces***   + Complete key request forms and send completed forms with the new hire to the [Card Office to pick-up keys](https://emu.uoregon.edu/key-and-access-office/key-orders-and-issuances).   + Provide door codes as necessary.   + Provide the address and hours for the building of the new hire’s workspace. * **Assist employee with access to technology\*\***   + [Duckweb](https://duckweb.uoregon.edu/pls/prod/twbkwbis.P_WWWLogin), [Email](https://it.uoregon.edu/duckid)   + Department-specific software, shared drives, servers, etc.   + Equipment (i.e. copier, printer, scanner, telephone)   + Codes   + Applicable technology-related policies   *\*\* Certain employee groups may require access to technology, such as Duckweb and Canvas, prior to start date.*   * ***Welcome new hire and introduce to colleagues*** For example, show them their workspace, tour the department (supplies, mailroom/copy area, break room, restrooms, etc.), and introduce to colleagues along the way. Share schedule of introduction meetings with selected colleagues, if applicable (see Prepare for New Hire Arrival section above). * **Schedule new hire for orientations and trainings** i.e. [New Employee Orientation](https://hr.uoregon.edu/learning-development/new-employee-orientation-program), New Faculty Orientation, and other appropriate trainings for the position. * ***Register for*** [***UO Alerts***](https://safety.uoregon.edu/uo-alert)Discuss building/office safety/emergency plans, as applicable. * ***Provide payroll information*** Discuss [pay schedule](https://ba.uoregon.edu/content/paydays), time reporting, [direct deposit](https://ba.uoregon.edu/content/direct-deposit-0), and paperless paystub options. * **Discuss transportation options** Review commuter and parking options and allow time for the new hire to visit [Parking and Transportation Services](https://parking.uoregon.edu/) to purchase a [parking permit](https://parking.uoregon.edu/landing-page/permit-parking), if applicable. * **Review applicable UO policies and procedures** This may include the following, as applicable: working hours, breaks, [sick and vacation leaves, holidays](https://hr.uoregon.edu/hr-programs-services/benefits/time), personal days, telephone, email, and internet use, staff meetings, customer service philosophy, confidentiality, [workplace injury](https://safety.uoregon.edu/injury-reporting-and-workers-compensation), etc. |

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| **Step 3: Onboard & Orient New Hire Continued** *Complete within the* ***first month*** *of employment* |
| * ***Discuss the following responsibilities and resources, as applicable:***   + [Title IX](https://titleix.uoregon.edu/)   + [FERPA](https://generalcounsel.uoregon.edu/ferpa)   + [Reporting requirements for Student Sexual & Gender-Based Harassment & Violence Complaint & Response policy](https://titleix.uoregon.edu/employee-reporting-responsibilities)   + [Mandatory reporting child abuse and neglect](https://hr.uoregon.edu/policies-leaves/general-information/mandatory-reporting-child-abuse-and-neglect)   + [Campus Security Authority (Clery Act) and resources](https://police.uoregon.edu/campus-security-authorities)   + [Respectful Workplace](https://hr.uoregon.edu/employee-labor-relations/workplace-climate/annual-respectful-workplace-notice)   + [Travel](https://ba.uoregon.edu/content/travel)   + [Purchasing and Contracting](https://pcs.uoregon.edu/) * ***Discuss employment policies*** Refer to [collective bargaining agreement or appropriate employment policies](https://hr.uoregon.edu/employee-labor-relations/employee-groups-cbas). |
| **Recommended Actions**   * Review new employee resources. Visit the [MyTrack Onboarding portal](https://hr.uoregon.edu/recruitment/mytrack-talent-management-system/mytrack-user-guides-tools/onboarding/employee) or the [New Employees](https://hr.uoregon.edu/new-employees) tab on the [HR website](https://hr.uoregon.edu/) for information and resources. * Introduce the [Employee Assistance Program](https://hr.uoregon.edu/hr-programs-services/benefits/wellness-programs/employee-assistance-program). * Share [Find People](https://www.uoregon.edu/findpeople/) (on-line directory). * Share [campus maps](https://map.uoregon.edu) and units on campus. * Orient to mailboxes and campus mail. |
| **Step 3: Onboard & Orient New Hire** *Complete within the* ***three months*** *of employment* |
| * New hire must complete [Mandatory Workplace Harassment & Discrimination Prevention training](https://hr.uoregon.edu/learning-development/workplace-harassment-prevention). |