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Onboarding New Employees and Managing the Employee Exiting Process

Office of Human Resources

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ONBOARDING

Hands-on education for real-world achievement.

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The faster new hires feel welcome and prepared for their jobs, the faster they will be able to successfully contribute to the firm's mission.

– Society for Human Resources Management (SHRM) Foundation

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What is Onboarding?

- Provides information that will ease the transition into the workplace
- Paints a precise picture of the department and the University as a whole
- Introduces departmental goals, policies and procedures, customs and traditions
- Conveys the expectations
- Relieves anxieties about starting a new job
- Inspires a good attitude toward the University and new job

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Why is Onboarding Important?

- Lays a foundation for career with the department
- Helps new employee feels comfortable in new position and helps them reach full potential quickly
- Provides concise and accurate information to make employee more comfortable in the job
- Encourages employee confidence and helps adaptation
- Contributes to a more effective, productive workforce
- Improves employee retention
- Promotes communication between the supervisor and the new employee

Components

- Departmental & Supervisor role
- Human Resources & Payroll role
- Employee responsibilities
- University role

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Department & Supervisor

- Develop good communication with the new employee from the start
- Set distinct, well-defined expectations that will reduce potential misunderstandings that may occur later

The more an employee knows about where they work, the more comfortable the employee will feel in their new position

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Department & Supervisor

- Prior to Start Date
  - Prepare workspace
  - Communication
  - Request accesses
  - Develop onboarding schedule
  - Schedule meetings & trainings
  - Make announcements & update directories
  - Order essentials

Department & Supervisor

- On Start Date
  - Discuss essentials
    - Position description
    - Expectations
    - Department structure
    - Critical procedures
  - Building orientation/tour
  - Immediately conduct required trainings

Department & Supervisor

- During First Week
  - Team introductions
  - Assign mentor (optional)
  - Conduct system trainings & reviews
  - Check in regularly
  - Meet at end of week to debrief

Department & Supervisor

- During First Month
  - Schedule ergonomics review
  - Conduct one-on-one meeting(s)
  - Discuss resources for job
    - Employee groups
    - Handbooks
    - Policies & procedures

Department & Supervisor

- For New Classified Employees (only)
  - At 5 months
    - Prepare trial service evaluation
  - At 6 months
    - Conduct trial service evaluation meeting

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HR & Payroll Services

- Distribute onboarding tasks to new employees and their supervisors
- Set up new employee in the HR/Payroll systems
- Provide reminders about outstanding tasks
- Provide information and serve as a resource for new employee questions and concerns

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HR & Payroll Services

- Administer electronic new hire paperwork system (HEROES)
- Electronically routes paperwork to various review and approval queues
  - Employees still required to visit HR-Payroll Services to present documentation for Form I-9
- Provides employees and supervisors with prompts and reminders about outstanding tasks

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HR & Payroll Services

- New Employee Orientation
  - Parking & transportation
  - Payroll
  - Paid leave, accrual, and use information
  - Overtime, comp time, and exchange time
  - Meal and rest periods
  - Holidays
  - Important university reminders/policies
  - Campus Safety
  - Office of Workplace Learning (O.W.L.)
  - And more!

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HR & Payroll Services

- New Benefits Orientation (benefits eligible employees)
  - Benefit enrollment and eligibility
    - Core benefit enrollment
    - Optional benefit programs
    - Wellness benefits
  - Retirement enrollment and eligibility
    - Retirement plan overview
    - Supplemental savings programs available immediately

In-person new benefits orientation offered every month

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Employee

- Complete new hire paperwork in a timely fashion
- Complete benefits enrollment in a timely fashion, if applicable
- Review/complete trainings/information presentations in a timely fashion

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University

- Ensure environment is welcoming, nurturing, and positive
- Convocation

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QUESTIONS?

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EXITING

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An effective and consistent exit process plays an important role in protecting the interests of both Oregon Tech and exiting employees. In addition to paying attention to safety, security, and protection of physical assets, it is important to remember that past employees will continue to act as ambassadors regarding the work environment and can serve as a terrific source for referrals.

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Exiting Opportunities

- A smooth off boarding process allows for several opportunities
  - Set the stage for boomerangs
    - *return in the future*
  - Allows the University to enhance our brand and reputation
    - *Opportunity for referrals, future employees, students, private industry contacts, program partnerships, donors, etc.*
  - Growth and learning
    - *exiting employees are often far more honest when providing feedback*

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Purpose

- Protects physical property
- Ensures compliance & security with regard to:
  - systems access
  - physical access
- Assists in the transfer of knowledge
- Collects valuable feedback
- Helps to maintain and promote our reputation as an employer of choice
- Provides employees with an organized way to wrap-up and transfer projects

Challenges

- Change is hard, no matter what the motivation is

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Knowledge Transfer

- For a smooth transition it is beneficial for supervisors to dedicate time to collaborate with the departing employee regarding:
  - *Current and key projects*
  - *Upcoming deadlines*
  - *Contacts*
  - *Institutional knowledge*

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Knowledge Transfer (cont.)

- Consider asking the employee to provide:
  - *A project status report which might include:*
  - *A list of all current, outstanding, and important upcoming projects, deadlines and tasks*
  - *A list of ongoing regular tasks*
  - *Open items on which the employee is currently working*
  - *Contact information for those with whom an employee has been working on tasks, projects, committees, etc.*
- A list of key contacts to whom someone else should be introduced before the current employee leaves their position.
- A list of external resources and groups with whom the exiting employee interacts in fulfilling one's core responsibilities.
- Compilation of specific files/records/emails related to current or past projects to be retained for a period of time.
- Compilation of standard operating procedures and manuals.

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Process

Automated through HEROES

Both employee and supervisor receive a clear overview of the process

Process goes beyond collecting key and badge and goes into details

All exiting employees have an opportunity for an exit interview and to take an exit survey

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Workflow

Employee Resigns/Retires → Ensure HR is provided notice → Checklist is sent 1 month before departure or upon notice → Supervisor, Employee, and HR/Payroll receive respective checklists

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Other Termination of Employment

- You will receive information and resources from the Office of Human Resources for other termination situations.

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Employee Responsibilities

- Voluntary Resignation Letters & Retirement Notifications should include:
  - Last day on campus
  - Last day in paid status
  - New address, if moving
  - Type of departure: resignation or retirement
  - Reason for resignation (optional)

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Employee Tasks

Submit a letter or email of resignation	Schedule exit interview (optional)
Return key fob/building access items to your supervisor	Review custody agreement/loan agreement/petty cash fund with Office of Business Affairs
Provide Payroll with any leave you anticipate taking during your last month	Review employee account - pay outstanding balances (tuition, printing charges)
Submit actual leave taken to Payroll on your last day on campus	Review & submit final reimbursement & travel reports
Contact Benefits with questions	Campus Lab Owners: Contact EH&S
Submit an update with your new address if moving	Faculty: Submit final grades
Return university procurement card(s) (Pcard) and/or department credit card(s)	Change Voicemail and Email auto response to indicate proper contacts
Return Oregon Tech Library book(s)	Collect and remove personal property from campus
Return all borrowed Oregon Tech materials & equipment	Schedule meeting(s) with supervisor to discuss and plan for knowledge transfer
Return ID card and name badge to your supervisor	Complete exit survey

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Supervisory Responsibilities

Verify that HR has received the resignation notice or forward a copy	Remove employee from departmental mailings and distribution lists
Collect employee key fob/building access items and return to facilities	Ensure alternate contacts are established for employee out of office voicemail, email, etc.
Ensure payroll receives actual leave taken and time records for last month on employees last day	Submit ITS Exit Form in MyOIT (Banner, computer services, email, telephone, long distance code, network access, Blackboard)
Collect university procurement card (Pcard) and department credit cards and all receipts	Meet with employee to ensure knowledge transfer occurs and all questions are addressed
Collect any borrowed OT materials and equipment	Faculty: Ensure final grades are submitted
Collect employee ID card and badges	Temporarily reassign job duties as needed for coverage
Ensure EH&S is contacted for exit information when the employee is a campus lab owner	If appropriate, work with employee to ensure position description is accurate and updated
If employee is paid from or managing a grant project contact SPGA	Contact HR re: staffing needs to backfill position
Remove employee name from building directories	Email Marketing if employee has web editor access
Remove employee name from websites	Cancel systems access (e.g. Blackboard, DegreeWorks)
Advise employee about exit interview options	Notify key customers & internal contacts as appropriate

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QUESTIONS?

Resources

- Onboarding | www.oit.edu/hr/onboarding
  - Checklists for employees and supervisors
  - Departmental onboarding resources at www.oit.edu/hr/departmental-onboarding
  - New employee resources at www.oit.edu/hr/new-employee-resources

- Exiting
  - Coming soon!

Contacts

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