

**A checklist to assist supervisors or department representatives when onboarding new classified, unclassified, academic faculty and post doc employees. Use of the checklist is optional.**



\_\_\_\_\_ Last Name

\_\_\_\_\_ First Name

\_\_\_\_\_ Middle Name

**Purpose**

To help new employees get off to an optimum start.

When planning the onboarding of a new employee, it is suggested the first few days or first week be dedicated to onboarding and training activities.

Onboarding is most successful when a new employee is paired with a mentor. The mentor can be a co-worker, manager, department contact, or other individual who can help the new employee navigate their first few months at OSU. It is suggested the search committee members reach out to the new employee, helping them feel welcome. It may also be appropriate for committee members to check in with the new employee on a regular basis.

**Check List Instructions**

Review and discuss all applicable items on the list with the new employee. Questions may be directed to your business center human resources staff.



\* Indicates items which can be completed prior to a new employee's first day of work.

**Job Tools Setup**

\_\_\_\_\_ Phone/Telecom\*  
<http://is.oregonstate.edu/network-wireless/telecom>

\_\_\_\_\_ Long distance calling code\*  
<http://is.oregonstate.edu/network-wireless/telecom/telephone-coordinators>

\_\_\_\_\_ Data port\*  
<http://is.oregonstate.edu/network-wireless/flexnet-data-services>

\_\_\_\_\_ Order business cards\*  
<http://printmail.oregonstate.edu/design-online>

\_\_\_\_\_ Request email address, shared network/file access, and shared calendar access\*  
<http://is.oregonstate.edu/accounts-support/cn>  
<http://oregonstate.edu/helpdocs/e-mail/college-specific-email-accounts>

\_\_\_\_\_ Computer and peripherals\*

\_\_\_\_\_ Add email in scanning feature on departmental copier (if applicable)\*

\_\_\_\_\_ Other

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# Request Systems Access and System Training Required for Position

\_\_\_\_\_ Banner

<http://oregonstate.edu/is/training/admin-systems-training>

\_\_\_\_\_ EPAF

[http://oregonstate.edu/dept/computing/train/cbt/hris\\_banner/EPAF\\_Training\\_Originators\\_BC.pdf](http://oregonstate.edu/dept/computing/train/cbt/hris_banner/EPAF_Training_Originators_BC.pdf)

\_\_\_\_\_ Data Warehouse

<http://oregonstate.edu/is/training/admin-systems-training/basic-training/data-warehouse-basics>

\_\_\_\_\_ CORE (this is position assigned so set up is not required unless position requires

<http://oregonstate.edu/budget/cooperative-open-reporting-environment-core>

\_\_\_\_\_ Appworx

<http://oregonstate.edu/is/training/admin-systems-training/basic-training/appworx>

\_\_\_\_\_ OSCAR

\_\_\_\_\_ PeopleAdmin

<https://jobs.oregonstate.edu/hr>

\_\_\_\_\_ Nolij

<http://is.oregonstate.edu/business-systems/nolij>

\_\_\_\_\_ Other

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## General Reminders

\_\_\_\_\_ Update unit directories\*

\_\_\_\_\_ Add name and contact information to website\*

\_\_\_\_\_ Graduate faculty nomination (if applicable)

<http://gradschool.oregonstate.edu/faculty/membership>

\_\_\_\_\_ Create supervisory file\*

\_\_\_\_\_ Nameplate for work space\*

\_\_\_\_\_ Obtain and mail three day complimentary OSU parking pass to new employee\*

Contact Transportation Services at 541-737-2583 or visit 100 Adams Hall

\_\_\_\_\_ Contact Business Center to set up initial meeting\*

\_\_\_\_\_ Add Employee to Departmental Mailing/Distribution Lists (as applicable)\*

\_\_\_\_\_ Notify Employee of required special attire prior to start date\*

\_\_\_\_\_ Check with Employee regarding ergonomics or other special needs\*

\_\_\_\_\_ Verify Employee is aware of Parking Policies at OSU prior to start date\*  
<http://parking.oregonstate.edu/>

\_\_\_\_\_ Establish training plan\*

\_\_\_\_\_ Other

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### Employee's First Day

\_\_\_\_\_ Instruction on phone, use, and number, provide departmental phone list, discuss preferred method of answering the phone  
Google phone make and model

\_\_\_\_\_ Introduce to email address(es), Outlook, and shared calendar(s)

\_\_\_\_\_ Obtain keys / tags; complete Key Request Form prior to start date\*  
<http://facilities.oregonstate.edu/key-shop>

\_\_\_\_\_ Identify CN / College IT support group  
<http://is.oregonstate.edu/accounts-support/cn>  
<http://oregonstate.edu/helpdocs/e-mail/college-specific-email-accounts>

\_\_\_\_\_ Other

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### Unit, Building, Work Space, and Resources Overview

\_\_\_\_\_ Verify that employee obtained OSU ID Card  
<http://fa.oregonstate.edu/business-affairs/idcenter>

\_\_\_\_\_ Confirm employee has completed enrollment to sign up for benefits (if applicable)  
<http://hr.oregonstate.edu/benefits>

\_\_\_\_\_ Identify delivery location for first paycheck

\_\_\_\_\_ Confirm Employee met with BC HR or Unit HR Contact for onboarding  
<http://oregonstate.edu/campusmap/>

\_\_\_\_\_ Set up meeting BC Finance & Accounting team if employee will purchase, travel, have budget authority  
<http://oregonstate.edu/fa/bc/my-bc/unit>

\_\_\_\_\_ Provide dates for OHR New Employee Orientation Sessions  
<http://hr.oregonstate.edu/orientation/new-employee-resources>

\_\_\_\_\_ Provide employee with link to Employee Online Services  
<http://oregonstate.edu/main/online-services>

\_\_\_\_\_ Workers' Comp / requirement for reporting incidents or injuries  
<http://hr.oregonstate.edu/benefits/workers-compensation-resources>

\_\_\_\_\_ Unit/office etiquette, dress code culture, and traditions

\_\_\_\_\_ Co-worker and department/colleague introductions

\_\_\_\_\_ Customers introductions

\_\_\_\_\_ Review structure of unit, provide copy of organizational chart

\_\_\_\_\_ Location of mailbox / mailroom

\_\_\_\_\_ Campus & US Mail locations  
<http://printmail.oregonstate.edu/mailling-services>

\_\_\_\_\_ Copiers and copier codes

\_\_\_\_\_ Location of recycling, composting & trash receptacles

\_\_\_\_\_ Letter head and correspondence formats (if applicable)

\_\_\_\_\_ Location of supplies and procedure for ordering supplies

\_\_\_\_\_ Building orientation, including location of:  
<http://oregonstate.edu/campusmap/>

Fire alarm pulls and fire extinguishers

Exits and evacuation routes

Automated external defibrillators (AEDs) and first aid kits

Evacuation assembly point for department outside of building

\_\_\_\_\_ Other

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## **Employee Expectations**

\_\_\_\_\_ Review position description

Contact your unit contact or your Business Center HR contact if a copy has not been sent to you.

\_\_\_\_\_ Discuss departmental expectations and courtesies, supervisor's management style, and performance evaluation form and timeline

\_\_\_\_\_ Provide letter of expectations (if applicable)

\_\_\_\_\_ Use of Out of Office assistant when absent, indicate who to contact when unexpectedly absent

<http://hr.oregonstate.edu/e-book/your-career-osu>  
[SEIU/Oregon Public Employees Union \(SEIU\) Collective Bargaining Agreement](#)

\_\_\_\_\_ Outline expectations and parameters for time reporting, overtime, and leave usage  
<http://mytime.oregonstate.edu/empcenter-training>

\_\_\_\_\_ Verify that employee holds required certifications (if applicable)

\_\_\_\_\_ Other

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## University Policies and Expectations for Review

\_\_\_\_\_ OSU Policies and Standards

<http://oregonstate.edu/leadership/policies>

\_\_\_\_\_ OSU Acceptable Use of University Information

<http://fa.oregonstate.edu/gen-manual/acceptable-use-university-information>

\_\_\_\_\_ OSU Acceptable Use of University Computing Resources

<http://fa.oregonstate.edu/gen-manual/acceptable-use-university-computing-resources>

\_\_\_\_\_ OSU Information Security Policies & Procedures

<http://oregonstate.edu/fa/manuals/is>

\_\_\_\_\_ OSU Conflict of Interest

<http://fa.oregonstate.edu/pacs-manual/100-purchasing-and-contract-ethics/104-conflict-interest>

<http://research.oregonstate.edu/coi-0>

\_\_\_\_\_ Ethics at OSU

<http://hr.oregonstate.edu/manual/ethics>

\_\_\_\_\_ Provost's Council Ethos

<http://leadership.oregonstate.edu/provost/provosts-council-ethos>

\_\_\_\_\_ OSU Office of Audit Services

<http://oregonstate.edu/leadership/audit/home>

\_\_\_\_\_ OSU Fraud, Waste, and Abuse Reporting Policy

[http://oregonstate.edu/leadership/sites/default/files/trustees/agendas-minutes/osu\\_fwa-policy.pdf](http://oregonstate.edu/leadership/sites/default/files/trustees/agendas-minutes/osu_fwa-policy.pdf)

\_\_\_\_\_ OSU No Smoking Policy

<http://oregonstate.edu/smokefree/>

\_\_\_\_\_ OSU Procurement and Contracting Ethics

<http://pacs.oregonstate.edu/ethics>

\_\_\_\_\_ OSU Bullying Policy

<http://oregonstate.edu/ombuds/information-workplace-bullying>

\_\_\_\_\_ OSU Respectful Workplace Environment

<http://hr.oregonstate.edu/main/documents/respectful-workplace-environment>

\_\_\_\_\_ Other

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**Employee Trainings/Certifications**

\_\_\_\_\_ OSU Safety Program & Right to Know

<http://oregonstate.edu/ehs/sd0001>

\_\_\_\_\_ New employee in charge of laboratory or field research? Contact OSU Environmental Health & Safety.

541-737-2273

[ehs@oregonstate.edu](mailto:ehs@oregonstate.edu)

\_\_\_\_\_ FERPA

<http://oregonstate.edu/registrar/ferpa-training-module>

\_\_\_\_\_ First Aid (if applicable)

<http://oregonstate.edu/recsports/safety-classes>

\_\_\_\_\_ Motor Pool (if applicable)

<http://motorpool.oregonstate.edu/>

\_\_\_\_\_ Other Trainings

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If checklist is utilized, retain completed checklist in the supervisory file at the departmental level.

## Supervisor / Department Guide

**Purpose:** To assist supervisors/departments in utilizing the New Employee Onboarding Supervisor/Department Checklist. The goal of using the checklist is to ensure new employees receive consistent information regarding university resources, policies and procedures. This guide provides additional/background information about certain items in each section of the Supervisor/Department Checklist.

### Phone/Telecom

It currently takes Telecom up to 6 weeks to address a request for a phone installation and/or make changes to an existing phone set up. It is suggested this process begin as early as possible to ensure the new employee has an active phone and phone number on their start date, or soon after their start date. Please visit the link on the checklist for information on how to initiate this process.

### Long Distance Calling Code

The request for a long distance calling code can be sent well in advance of the new employee start date. The present turnaround time for requests is 1-2 working days. Please visit the link on the checklist for information on how to initiate this process.

### Data Port Setup

It can take up to a couple weeks to have a data port activated and significantly longer when there is a need for a new port installation. It is suggested this process be started as early as possible to ensure the new employee has an active data port for their computer on their first day or soon after their start date. Please visit the link on the checklist for information on how to initiate this process.

### Business Cards

It takes approximately two weeks for the completion of a business card order. It is recommended business cards be ordered well in advance so they are available on or before a new employee's start date. Prior to submitting the business card order form, it is suggested that the new employee is contacted regarding how they want their name to appear on the business cards and if they have credentials to include.

### Setup Email Address, Shared Network/File Access, and Shared Calendar Access

By arranging these items in advance, it enables a new employee to quickly and easily access their email, shared files or calendars on their first day, empowering them to become familiar with departmental computing and electronic resources.

### Computer and Peripherals

The new employee's work station and computer should be set up and operational prior to their start date. These preparations can help make them feel welcome and empowers them to quickly get acquainted with their space and computing resources.

Setup Email Scanning Feature on Departmental Copier

Having this set up ahead of time, makes it possible to quickly and easily cover the topic and demonstration during the departmental onboarding/tour on or soon after the new employee's first day.

Update Unit Directories

Unit directories include but are not limited to phone lists, building directories, and contact lists for customers.

Create Supervisory File

To begin with, this file can include a copy of the signed letter of offer and the original signed position description. Over time, supervisors can add information regarding performance, professional development, and changes to the position. \*\*\*THIS FILE IS CONFIDENTIAL\*\*\*

Name Plate for Workspace

This is the plate, sign or tag which is hung outside an office or a cubicle identifying the person within. For some departments, an additional personal name badge or tag may be required.

Contact Business Center to Set Up Initial Meeting

An important part of the new employee onboarding process is meeting with the Business Center's Human Resources and Finance & Accounting groups. The two groups will provide an in depth onboarding for new employees, introducing them to the operational structure of OSU. They will also help the new employee complete the required new hire paperwork. To find your BC HR contact, please visit: <http://oregonstate.edu/dept/fa/bc/my-bc/unit>

Add Employee to Departmental Mailing Lists

Adding a new employee to departmental and university distribution lists ensures they receive important mail, OSU messages and emails sent.

Notify Employee of Any Required Special Attire Prior to Start Date

This will enable your new employee to arrive ready to work on their first day. Depending on the type of duties, this can include steel toed boots, long sleeves and pants, closed toed shoes, etc. This can also include specific guidance for a department's dress code.

Check in With Employee Regarding Special Needs/Accommodations

This can include asking the new employee if they have any sensitivities or allergies to fragrances, sensitivities to lights or sounds, needs to sit/stand/move around frequently. Make sure to let them know they do not need to disclose anything they do not feel comfortable disclosing, and that questions are to ensure the workplace is safe, comfortable, and welcoming.

Check In With Employee Regarding Ergonomics

An ergonomic question can include a need a foot rest, desk adjustment, or offer the option to speak with an ergonomist on or soon after their first day of work.



Establish Training Plan

Preparing the plan will help guide the first few days and weeks of the new employee's time at work, helping them focus on training and learning so they can perform their job at OSU. This also helps the supervisor/department be prepared for the new employee's first day.

Verify that Employee Obtained OSU ID Card

This is an important (and exciting) item for a new employee. The ID card enables the new employee access to deals around Corvallis, participation in the Orange Rewards program, use the library, and provide verification they are allowed to be in a campus building after hours if questioned by OSP or Campus Safety.

Location of First Check

The first paycheck is very important to new employees. It is necessary for you to identify where they can pick up the first paycheck. There are three options for first paycheck delivery: their business center, Central Payroll office in Kerr Admin Building, or to their department via Campus Mail. Ask your business center, if you are not sure, which of these locations the check will be sent. Always let the new employee know where they can pick up their first paycheck or if it will be mailed to the department via Campus Mail.

OHR New Employee Orientation Sessions

Employees receive important information about conditions of employment, safety, mandatory reporting, sexual harassment, and other resources available at OSU. It is important and strongly recommended all new (and current, if they have not attended before) employees attend one of the monthly all-day sessions.

Ensure that Employee Is Aware of MyOSU

Online Services is a powerful tool. Encourage the new employee to login to the portal and explore the resources in Online Services.

Worker's Compensation/Reporting Incidents or Injuries

Discuss how an employee is to report incidents or injuries at OSU. Show the new employee available resources on the Office of Human Resources website. Explain the importance of reporting incidents and injuries in a timely fashion. For more information, visit the link on the checklist and/or contact the HR Office unit which handles Worker's Comp for OSU.

Building Orientation

In order to meet Occupational Safety and Health Administration OSHA requirements, each new employee needs to be made aware of the items on the checklist under Building Orientation. Please make sure to go over these items on their start date or within their first couple days on the job.

Review Position Description

Reviewing the position description ensures the new employee understands the position duties list is complete and accurate, and also ensures the employee is aware of the content of the job.

Discuss Expectations, Supervisor's Management Style, and Performance Evaluation Format

Discussing expectations with a new employee outlines the supervisor or departmental priorities and clarifies work objectives; establishes a basis for fairness and constructive feedback; helps to eliminate misunderstandings because expectations are agreed on and discussed up front; encourages constructive communication, mutual understanding of what needs doing and how it will be done; empowerment and self-assessment of work completed; and establishes a starting point for coaching, appraisal, and discipline.

Discussing management style ensures the new employee is aware of how their new supervisor manages employees.

Indicate method (electronic EvalS system, paper format) and how often a performance evaluation is conducted. Outline which performance elements are managed by the employee and which elements are handled by the supervisor.

Setting Out of Office when Absent, Who to Contact when Unexpectedly Absent

Identify the department's expectations for preparing for a planned absence and whom to contact when unexpectedly absent.

Trial Service (Classified Staff)

The six-month, "trial service" period is an extension of the selection process. The trial service period gives an employee a chance to demonstrate their skills and abilities. If the trial service performance is determined to be unsatisfactory, an employee may be dismissed at any time during the six-month period.

If performance is satisfactory, a new employee will gain regular employee status at the end of six months.

Time Reporting, Overtime, and Leave Usage

Address the department's expectation for reporting time worked, working overtime and/or requesting to work overtime, and planned and unplanned leave usage.

Certifications (if applicable)

If any certifications were a minimum qualification for the position during recruitment, ensure a departmental representative or the supervisor sees the certification documentation on or before the employee's start date.

University Expectations

Ensure new employees review and understand all University Expectations applicable to their position and to them as an employee.

OSU Safety Program and Right to Know

In order to meet OSHA requirements, each new employee needs to be made aware of the items on the checklist under Building Orientation. Please make sure to go over these items on their start date or within the first couple days of their start date.

New employee in charge of laboratory or field research?

An Environmental Health & Safety (EH&S) representative will meet with the new employee for about 20-30 minutes to discuss regulatory requirements, laws, policies, best practices, permits, and available resources that are necessary to properly set up a new research program at OSU. All research is governed by OSHA, EPA, NIH, Office of Homeland Security, and other regulatory bodies.

FERPA

If the new employee will interact with students or student data, they are required to take the FERPA training and submit their FERPA training completion certificate to the Office of the Registrar.