Research shows that an employee who experiences an excellent onboarding process is more likely to stay long-term with that company. This planning tool is designed to help hiring departments on the Norman campus achieve that level of excellence in onboarding.

**Suggested Use:** Once a new employee accepts a job offer, the hiring department will use this as a guide for planning and completing the onboarding process. It should not be turned in to HR.

**TABLE OF CONTENTS**

NEW EMPLOYEE’S INFORMATION .................................................................2
BEFORE THE START DATE .............................................................................2
  Norman Programs New Employee Processing .............................................2
  HSC Programs New Employee Processing ..................................................2
  Prepare Employee and Team for the First Day ..........................................4
THE FIRST DAY AT WORK ...............................................................................5
  Welcome to the Team ..................................................................................5
THE FIRST WEEK ............................................................................................6
  Procedures and Processes .........................................................................6
  Benefits Overview (benefits-eligible employees only) ...............................7
  Training and Development Overview ......................................................8
  Access to Accounts, Calendars, and Systems ..........................................8
THE FIRST 30 TO 90 DAYS ..........................................................................9
  Benefits Enrollment (benefits-eligible employees only) .........................9
  Training and Development ..................................................................9
NEW EMPLOYEE’S INFORMATION

NAME:

START DATE:

TITLE:

PHONE:

EMAIL:

BEFORE THE START DATE

NORMAN PROGRAMS NEW EMPLOYEE PROCESSING

☐ If needed, complete background check authorization through HR
  • See step 7 of Recruitment & Hiring on the HR website

☐ Make sure the employee has a New Employee’s Checklist to guide them through the hiring process with you

☐ Send employee the link to myOU Online Orientation at newemployee.ou.edu

☐ Have the employee print, complete, and turn in the packet of new employee forms to Human Resources on or before the first day (as early as possible)
  • See Getting Hired & Paid on the HR website for descriptions/actions needed

Pay special attention to these forms:
  • Federal I-9: Employee only completes section 1 of the I-9 form, then brings in required form(s) of identification so the employer can complete section 2
  • Direct Deposit Authorization: Requires bank documentation
  • Loyalty Oath: Requires a notary (Payroll & Employee Services has a notary on staff)

International Employees: complete this packet of forms instead

HSC PROGRAMS NEW EMPLOYEE PROCESSING

☐ Complete background check authorization through HR
  • See step 7 of Recruitment & Hiring on the HR website

☐ Make sure the employee has a New Employee’s Checklist to guide them through the hiring process with you
☐ Complete first 5 forms listed on the New Employee Forms and Notices from the HR website on or before the start date (as early as possible)
  • See Getting Hired & Paid on the HR website for descriptions/actions needed

☐ Submit New Hire ePAF on or before the start date (as early as possible). Attach the 5 completed forms as one file in this order:

1. Personal Data Form (PDF)
2. Loyalty Oath
3. Staff Handbook Acknowledgement
4. HIPAA Role-Based Access Worksheet
5. Confidential & Proprietary Information Disclosure (CPID)

☐ Ask new employee to set up network account password. Instructions will be sent to the employee’s email address provided on the PDF within 24 hours of submitting the ePAF.

☐ Complete Section 1 of the online I-9 form on or before the start date; schedule a time for the employee to come into your office to complete this section together.
  • The employee needs to provide original form(s) of identification and enter their NetID and password as electronic signature
  • Section 2 of the I-9 is completed by the employer within 3 business days of the employee’s start date
PREPARE EMPLOYEE AND TEAM FOR THE FIRST DAY

☐ Send an email or call employee about their first day, including when to arrive, who to check in with, what to wear, where to park and how to get a permit (details below).

☐ To get a parking permit, the employee must follow the below instructions:
  - Obtain parking registration from the OU-Dispatch Center
  - Receive window cling during registration and attach to vehicle
  - There is no fee to register for campus parking, but employees must park in designated areas

☐ Prepare the employee’s work environment:
  - Clean and stock the work area with supplies
  - Set up computer and phone
  - Order business cards, name plate, keys, or name badge

☐ Inform your team about the new employee:
  - Include name, title, and start date
  - Encourage them to support the new person
  - Identify one team member to act as an orientation partner for the new employee’s first month (give that person tips on how to support the new employee)

☐ Set up meetings with critical people for the employee’s first few weeks

☐ Sign new employee up for the below orientation session(s) on the Training Calendar by clicking “Enroll person without network ID” at the bottom of the calendar:
  - myOU Live – Tulsa (all new OU Physicians staff are required to attend)
  - New Employee Onboarding
  - Customer Service Training
THE FIRST DAY AT WORK

WELCOME TO THE TEAM

☐ Be available to greet the employee on the first day.

☐ Complete any missing forms from the New Employee Processing section of this document.

☐ (Norman Programs Only) Ask the employee to set up their network account

Timing | The day after the ePAF is approved, you will receive an email from IT with the employee’s Sooner ID number. Send this to the employee and ask them to set up their network account by going to accounts.ou.edu and clicking New to OU? Set up account.

☐ Introduce employee to everyone on the team

• Tour the office, area, or campus (make sure to point out restrooms, break areas, and emergency exits)

• Connect the employee with their orientation partner

• If possible, eat lunch together

☐ Provide employee Access Card and Sooner ID badge

• Access Card:
  o Obtain an access management form from a designated official
  o Go to OU-Dispatch and ask to meet with the card keeper
  o Card keeper will distribute the access card to the employee
  o This process is part of the employee’s onboarding week

• Sooner ID Badge:
  o Employees go to the Office of Enrollment and Financial Affairs to request badge
  o Must bring valid Sooner ID to receive badge
THE FIRST WEEK

PROCEDURES AND PROCESSES

☑ Provide a link to the appropriate employee handbook:
  - Find the Staff Handbook here
  - Find the Faculty Handbook here

☑ Explain time & leave processes
  - Explain when and how pay cycles occur
  - For hourly employees, explain overtime vs comp time
  - Review attendance standards, how to request time off, and who to call if the employee will be absent
  - Provide link to Paydays, Checks, & Timesheets page
  - Provide link to Holidays, Time Off, & Leave page

☑ Review department procedures and standards such as:
  - Mission and values
  - Office meetings, supplies, and equipment
  - Office safety procedures
    - Evacuation process
    - Fire exits
    - Severe weather
    - On-the-job injury procedures
  - OU Alerts – check mobile number at accounts.ou.edu
  - Expectations for short breaks and/or lunches
  - Tobacco-free campus policy
  - Travel/mileage reimbursement, if applicable
BENEFITS OVERVIEW (BENEFITS-ELIGIBLE EMPLOYEES ONLY)

☐ Send the HR website’s Getting Insurance and Retirement Planning pages to the new employee for review

☐ Explain the following deadlines for benefits enrollment (Note: it’s best to enroll as early as possible to avoid multiple deductions):

- **Insurance** | Deadline to enroll is within 31 days of hire; will receive an email from HR with instructions; will default into core benefits if enrollment is not received in time (which may result in multiple deductions from one paycheck)

- **Retirement (if salaried)** | Must make elections within 90 days of hire; will receive an email from HR with instructions; will default into Option 1 with OTRS if election form is not turned in on time (which may result in multiple deductions from one paycheck); no changes allowed after initial election

- **Retirement (if hourly)** | No deadline and no action required; automatically enrolled in the hourly 401(a) plan; can elect Option 1 with OTRS at any time

☐ Let employee know their health insurance coverage begins on the first day of the month following the hire date; e.g. if start date is July 15, coverage is effective August 1. (Note: If an employee has not enrolled in benefits after coverage starts, healthcare providers will be unable to bill insurance for services rendered, and the employee will pay upfront for medical services, then later submit a claim to BlueCross BlueShield after they enroll in a healthcare plan.)

☐ Explain Sooner Credits to the new employee. Sooner Credits are the university’s way of contributing to an employee’s benefits premiums. These credits appear as earnings on the employee’s paycheck to offset the full premium deductions.

☐ Let employee know that the university will begin the defined contributions to the employee’s retirement savings plan 1 year after their start date in a benefits-eligible position; employee contributions to OTRS will begin on hire date, and voluntary employee contributions may begin at any time.
TRAINING AND DEVELOPMENT OVERVIEW

☐ Explain and review the required university trainings listed on the HR website.

☐ Identify additional trainings needed based on role, such as PeopleSoft or Financials trainings.

☐ Review procedures and expectations for performance management and evaluations.

☐ Schedule check-in meetings and six-month evaluation

☐ Explain annual evaluation process

☐ Encourage professional growth and employee development
  
  • Employee can enroll in workshops on the Training Calendar (most workshops are provided at no cost; some computer classes involve a small fee)
  
  • (Norman employees only) Lynda.ou.edu - online tutorials and workshops at no cost (just log in with Norman NetID and password)
  
  • The Faculty Development website provides more information for faculty who wish to participate in programs and workshops

ACCESS TO ACCOUNTS, CALENDARS, AND SYSTEMS

☐ Get employee ID cards.

☐ Add the employee to relevant email lists and calendar events.

☐ Give or request access to any necessary systems based on their role, such as a shared network drive, HRMS (use this request form to add a user to HRMS), financial systems, course management systems, etc.
THE FIRST 30 TO 90 DAYS

BENEFITS ENROLLMENT (BENEFITS-ELIGIBLE EMPLOYEES ONLY)

☐ Remind employee to make health insurance elections in Self-Service within 31 days of start date (remember that earlier is better to avoid multiple deductions)

☐ If salaried, remind employee to make a selection for their retirement plan within 90 days of start date (remember that earlier is better to avoid multiple deductions for OTRS).

  • If the election form is not turned in by the 90-day deadline, salaried employees are defaulted into Option 1 with OTRS, which involves a defined employee contribution; this can result in multiple deductions from one paycheck to cover the 3 months of employee contributions that have passed
  • Remember that once a salaried employee is enrolled in a retirement plan, it cannot be changed

☐ If hourly, employee is already enrolled in the hourly 401(a) retirement plan; if they’d like to change to Option 1 with OTRS, they can turn in the hourly election form to HR at any time.

TRAINING AND DEVELOPMENT

☐ Remind employee to complete all university required trainings before the deadlines

☐ Continue to check in with the new employee to make sure they are settling into the new role. Here are some sample questions to ask:

  • Does the employee need any other resources, systems, or supplies?
  • How was the onboarding experience from their perspective?
  • How does the job compare with how it was presented in the interview?
  • Was their orientation partner helpful for that first month?
  • What questions do they have?