These checklists – New Hire Processing and Employee Onboarding - are offered to assist the department. New hire processing, pages 1 and 2, should be completed within the first workweek. Onboarding, page 3 thru 5, is a long-term process that begins before an employee’s start date and continues for at least 90 days.

HR/PAYROLL COORDINATOR’S NEW HIRE PROCESSING CHECKLIST

☐ Appointment. Complete the ePAF (electronic Personnel Action Form). If the employee is working in more than one department, the primary department is responsible for submitting the ePAF and secondary departments must provide chartfield spreads and position numbers to the primary department. Secondary departments must make sure their department’s position number is set up in OUHSC Position Data, located under Department Self Service in the PeopleSoft menu. Questions: contact HR Records at 271-2186.

☐ Benefits Enrollment. Provide the new employee the link for the Benefits enrollment web page: http://www.hr.ou.edu/pay_coord/beginbenefits.asp. This site provides information, forms, detailed instructions and a link to Employee Self Service. Employees must complete their enrollment within 31 days of hire.

☐ New Employee Orientation and Benefits Enrollment. http://hr.ou.edu/training_dev/catalog/. New employee orientation will cover basic new employee information and benefits information. If the new employee will be using PeopleSoft HR or Financials, schedule them to attend the appropriate classes as soon as practicable.

☐ Contact Tier I to set up computer.

☐ Tell the employee when he/she is scheduled to attend New Employee Orientation.

☐ Advise the employee of appropriate University training requirements: Sexual Harassment & Discrimination Awareness, Standards of Conduct Certification, HIPAA Privacy and Security Training, and Annual Safety Training (Communications and Fire Safety). Bloodborne Pathogen, Laboratory Safety and Radiation Safety Training are required for specific positions.

☐ Contact Telecommunications (271-5671) for authorization code if the employee requires long distance privileges.

☐ Get Employee ID Card
Contact One Card office (271-2980) to ensure that the employee is in their system before taking employee to get ID Card. The employee normally shows in the One Card system one working day after employee is in PeopleSoft HRMS.

☐ Activate Building Access
Contact OUPD Access Control Office (271-3285) to activate employee’s building access, as needed. For questions, refer to the OUPD Access Control Office web site.

☐ Keys
Refer employee to the Lock Shop – SCB 26A - to get a key, as required. Questions, call 48320. Lock Shop hours are Monday, Wednesday, and Friday: 8 to 10 am; Tuesday and Thursday 2:30 to 4:30 pm.

☐ Parking permit
Request parking permit at OUHSC Parking and Transportation Services website. Take the employee to the office, SCB 104, to pick up permit.
On or before first day on duty
Complete the following forms. The forms are in the Newcomers’ Packet and available to be completed online at the New Employee Forms and Instruction page of the HR website.

<table>
<thead>
<tr>
<th>Form</th>
<th>Description</th>
<th>Send to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Form I-9 Employment Eligibility Verification</td>
<td>Section 1 of this form must be completed by the employee no later than the first day of work. The employer must complete Section 2 within 3 workdays. Submit the completed I-9 with copies of the documents proving identity and employment eligibility. Under federal law, a person cannot be legally employed without an accurate I-9.</td>
<td>Human Resources</td>
</tr>
<tr>
<td>E-Verify</td>
<td>Proof that E-verify has been done must be attached to the I-9. The department may attach either a copy of the “Employment Authorized” sheet or write the 13 character case number at the top of the first page of the I-9. For foreign national employee without social security number: mark at the top of the I-9 “No SSN; will E-Verify when employee receives SSN.” For non-confirmations, consult your E-Verify manuals or call Human Resources at 271-2186.</td>
<td>Human Resources (attach to I-9)</td>
</tr>
<tr>
<td>Foreign National Information Form (FNIF)</td>
<td>Required if the employee checks the “An alien authorized to work until” selection in the attestation section of the I-9. Individuals making this selection are considered nonresident aliens and must fill out the FNIF for tax purposes on the first day of employment. Attach a copy of the nonresident alien Arrival/Departure Record (known as the I-94) front and back, a copy of the unexpired foreign passport, and other applicable immigration document to the FNIF.</td>
<td>Payroll</td>
</tr>
<tr>
<td>W-4</td>
<td>The W-4 is available in Employee Self-Service under ‘Payroll &amp; Compensation.’ Contact Payroll Services at 271-2055 with questions.</td>
<td>Payroll</td>
</tr>
<tr>
<td>Automatic Deposit Transmittal</td>
<td>State law requires that wages be paid via EFT. If the employee does not designate a financial institution, the employee’s wages will be distributed via the Oklahoma PayCard.</td>
<td>Human Resources</td>
</tr>
<tr>
<td>Staff Handbook Acknowledgement</td>
<td>Make sure that the employee can find the Staff Handbook online.</td>
<td>Human Resources</td>
</tr>
<tr>
<td>Loyalty Oath</td>
<td>Required by the State of Oklahoma, a notarized loyalty oath must be on file before the employee can be issued a paycheck. HR Records offers free notary services.</td>
<td>Human Resources</td>
</tr>
<tr>
<td>Computer Account Request</td>
<td>Must be completed to provide employee system access. If possible, you may want to complete in advance of first day on duty. Employee must also sign Computer User Account Policy.</td>
<td>IT Account Management</td>
</tr>
</tbody>
</table>

First week on duty

<table>
<thead>
<tr>
<th>Form</th>
<th>Description</th>
<th>Send to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vaccine History</td>
<td>For new employees, all vaccinations/immunizations required by the Infectious Disease Policy should be completed and on file with the Employee Health office within ten (10) days of employment. The hiring manager is responsible for verifying that the vaccination or immunization has been completed within six (6) months of date of employment.</td>
<td>Employee Health, Green Clinic</td>
</tr>
<tr>
<td>Animal Handler’s Health Questionnaire</td>
<td>All individuals whose job duties require animal handling must complete this form and submit it to Employee Health before working with animals.</td>
<td>Employee Health, Green Clinic</td>
</tr>
<tr>
<td>Employee Role Based Access Worksheet</td>
<td>This form must be completed by the supervisor or his/her designee for all employees of a Health Care Component (HCC). A copy of the form must be maintained by the employee’s department and updated as necessary.</td>
<td>Human Resources</td>
</tr>
</tbody>
</table>

OUHSC Employee Onboarding Checklist
Revised 10/12
**EMPLOYEE ONBOARDING CHECKLIST**

According to research, 27% of people who leave an organization leave within the first 90 days of employment; the most frequently reported reason for leaving is the relationship with the immediate supervisor. This checklist is intended to encourage communication between the new employee and the organization, as well as provide feedback. Make adjustments/changes to fit your organization.

### Before the employee’s arrival

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notify your unit that a new person is starting and what the person’s job will be</td>
<td></td>
</tr>
<tr>
<td>Ask the other staff members to welcome the new employee and encourage their support</td>
<td></td>
</tr>
<tr>
<td>Identify a staff member to act as an orientation partner for the first month</td>
<td></td>
</tr>
<tr>
<td>Set up phone and voice mail (if hiring documents are complete) email accounts are set up automatically after the hire process.</td>
<td></td>
</tr>
<tr>
<td>Set up the employee’s workstation (computer, phone, office supplies)</td>
<td></td>
</tr>
</tbody>
</table>

### Within the first week of arrival

The first week can be overwhelming to a new employee. We recommend you provide the following information in short sessions over the course of the first week.

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Discuss the following departmental and campus standards</td>
<td></td>
</tr>
<tr>
<td>• Personal Comfort</td>
<td></td>
</tr>
<tr>
<td>• Breaks and lunch</td>
<td></td>
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<tr>
<td>• Smoking areas</td>
<td></td>
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<tr>
<td>• Safeguarding personal belongings</td>
<td></td>
</tr>
<tr>
<td>• Performance Expectations</td>
<td></td>
</tr>
<tr>
<td>• University mandatory training: Standards of Conduct, HIPAA, Safety Training and Sexual Harassment and Discrimination Awareness Training</td>
<td></td>
</tr>
<tr>
<td>Review departmental mission and goals</td>
<td></td>
</tr>
<tr>
<td>Discuss job description and position's daily, monthly, and periodic duties</td>
<td></td>
</tr>
<tr>
<td>Discuss probationary period and performance evaluation at end of period</td>
<td></td>
</tr>
<tr>
<td>Provide or develop performance evaluation instrument and discuss policy, internal procedures, and the annual schedule</td>
<td></td>
</tr>
<tr>
<td>Discuss your department's internal and campus promotion practices</td>
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</tr>
<tr>
<td>Discuss departmental quality standards</td>
<td></td>
</tr>
<tr>
<td>Expectations</td>
<td></td>
</tr>
<tr>
<td>• Ethical standards</td>
<td></td>
</tr>
<tr>
<td>• Dress code</td>
<td></td>
</tr>
<tr>
<td>• Telephone procedures</td>
<td></td>
</tr>
<tr>
<td>• E-mail/Voice mail procedures and policy</td>
<td></td>
</tr>
</tbody>
</table>

OUHSC Employee Onboarding Checklist
Revised 10/12
- Personal calls and visitors
- Internal relationships and communications
- Confidentiality
- Customer service philosophy
- What to do when problems develop and assistance is needed

☐ Attendance Standards
  - Work hours
  - Time records and procedures
  - Explain when and how payroll occurs and how the direct deposit option works.
  - Absence reporting and whom and when to call
  - Emergency procedures and fire exits

☐ Paid leave and short-term disability, including unscheduled paid leave (Staff Handbook)
  - Compensatory time/overtime policy
  - Holidays (Staff Handbook or current list)
  - Jury Duty (Staff Handbook)

☐ Class attendance, career development seminars and training
  - Tuition waiver/class enrollment

☐ Outside employment and extra compensation (Staff Handbook)

☐ Security Standards
  - Opening and closing procedures
  - After-hours building access
  - Emergency procedures
  - Name tags (if applicable)

☐ Computer access codes
  - E-mail/Voice mail access codes

☐ Review Policies for Acceptable Use of Information Systems at OUHSC

☐ Travel/Transportation
  - Travel reimbursement
  - Use of University vehicles

☐ Office/Departmental Procedures
  - Decor
  - Staff meetings
  - Copy machine and fax use
  - Long distance calls
  - Ordering supplies
  - Office safety
  - First aid
  - Filing system

Other items you want to cover with the new employee

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OUHSC Employee Onboarding Checklist
Revised 10/12
## Within 2 Weeks
- Make sure the employee attends New Employee Orientation
- Schedule weekly or monthly meeting to touch base with employee
- Overview of budget and finance procedures and policies (if applicable)
- Facilitate enrollment in the university business process course (as applicable). Sign up online at [http://hr.ou.edu/training_dev/catalog/](http://hr.ou.edu/training_dev/catalog/)

## Within 1st Month
- Remind the employee to enroll for benefits via Employee Self Service within 31 days of hire date
- Review and clarify performance objectives and expectations after the first month
- Set up brief meeting with department head
- Meet with the employee to establish an early relationship and get information and feedback. Sample questions to ask:
  1. How does working here actually compare with the impression you got of the job during the hiring process?
  2. Is there anybody helping you to be successful that I could thank?
  3. Based on the other places you have worked, are there systems or ideas you feel could improve our operations?

## During First 90 Days
- Meet with employee to
  1. Review and discuss performance
  2. Provide feedback from 30 day meeting and provide employee with an update of actions undertaken in response to answers to questions asked.
- Re-recruit or counsel employee, as appropriate

## 5th and 6th Month
- Review performance objectives and progress
- Discuss training completed and development planned for the future

## Performance Review
- Conduct performance review
- Set objectives for the coming performance period with employee