

# ORIENTING NEW EMPLOYEES

Congratulations on the successful completion of the hiring of your new team member!

***Did you know that employees who have been properly oriented to their work environment experience greater satisfaction and success?***

The attached Employee Checklist should serve as a guide to ensure that you have covered the essential tasks to acclimate your new team member.

## Orientations:

### **Tier 1 - New Employee Orientation**

- New hire paperwork submission
- Email, password, pin setup, ID card
- Review of OU website
- Overview of OU's campus and culture to acclimate new employee
- Open forum to answer questions
- Receive benefits booklet and date of their next orientation

### **Tier 2- Benefits Orientation**

- Employee must follow instructions from tier 1 welcome newsletter- Logging in to update dependents/beneficiaries **prior** to their scheduled benefits orientation
- 1 on 1 orientation with benefits department
- Review of the benefits material
- Election of benefits for calendar year
- Enrollment into retirement program (if applicable or elected)

### **Tier 3 - Group Orientation**

- Your new employee has already been registered
- Half-day session (8am-Noon)
- Various speakers from across campus that provide essential information to new hires.  
Topic examples:
  - ✓ Retirement
  - ✓ University Recreation center membership
  - ✓ OU Police Department

This orientation is **highly recommended**. It is the only opportunity for your team member to learn about the wonderful things that OU has to offer in one centralized session.

## NEW EMPLOYEE CHECKLIST

Employee name \_\_\_\_\_

Date \_\_\_\_\_

*Use this checklist to provide your employee with resources and information that will aid in their successful onboarding to the university. **Please keep this information in your file.***

Initial	Before Arrival
	Notify staff of new employee's impending arrival
	Notify department's timekeeper of new employee
	Assign and prepare workspace (telephone, supplies, computer, furniture, software, etc.)
	Identify shadow partner or mentor (if available)
	Order name badge and name plate, if applicable

Initial	First Day
	Departmental welcome- Introductions & tour (bathroom, mailroom, supply room etc. )
	Review schedule of work hours, punctuality, timesheets, accruals, vacations, and Monthly Leave Reporting
	Complete signature authorization paperwork regarding Accounting, Purchasing and Payroll, if applicable
	Request OU Credit Card, if applicable
	Review confidentiality standards, such as FERPA, HIPAA or departmental standards as required for the position
	Order or transfer keys (employee must sign card)
	Complete Banner Access Request forms found at <a href="http://forms.oakland.edu">forms.oakland.edu</a>

Initial	First Week
	Tour the campus with employee (campus employee introductions)
	Discuss employee's working relationships to others in department and University
	Schedule appropriate training; Purchasing, Accounts Payable, Budget, Payroll, etc.
	Review OU policies and procedures (mileage, expenses, etc.) on web <a href="http://www.oakland.edu/policies/">http://www.oakland.edu/policies/</a>
	Update phone tree emergency list and organizational chart
	Explain organization, function and objectives of department as it fits within University community (Mission, Vision, Strategic Plan)
	Order business cards, if appropriate
	Demonstrate use of departmental equipment
	Ensure that employee attends the scheduled benefits orientation (2 <sup>nd</sup> tier orientation)
	Complete Banner Shared Data training if duties will include Banner access

Initial	First 90 Days
	Provide an Overview of the Performance Management Process, if applicable
	Set Goals within the first three months of employment, if applicable
	Ensure employee's attendance at New Employee Orientation (3 <sup>rd</sup> tier orientation)