**OUE New Employee Onboarding Paperwork and Procedures**

***This form should be completed by each new OUE employee and his/her supervisor with support from the departmental administrative professional. The completed/signed form, should be returned to OUE’s Assistant Director for Administrative Operations via Docusign within 4 weeks of the start date unless noted otherwise below.***

|  |  |  |  |
| --- | --- | --- | --- |
| Employee Name |  | Title/Position |  |
| Start Date |  | 6-month date: |  |
| Office (Location/#) |  | GT Office Phone: |  |
| GT Email Address |  |

**Pre-Boarding (Point of Contact: Unit Administrative Professional)**

* Steps defined by department
* Contact appropriate building manager/personnel (Clough, Success, French, etc.)
	+ to advise of any facilities/custodial needs
	+ to update any building directories or building listservs
	+ to ensure office is prepared, clean and ready for occupancy
* Contact appropriate IT personnel for the department (Clough, Success, French, etc.)
	+ to advise of any IT needs/changes, etc. (including ordering computer, with supervisor approval)

**Departmental Information (Building/Office and Directory) (complete within first month of start date)**

**Point Person: Unit Administrative Professional and Immediate Supervisor**

*(Note: where appropriate, please ensure that any departing employees have also been removed as well).*

* All department office/suite directory signage and door nameplate updated
* Verify employee information in GT online Directory is accurate (employee title, office, and campus phone #)
* Office 365 calendar access shared with administrative professional and appropriate individuals in department (per department policies)
* Order business cards and any departmental name tags or materials (OUE will handle OUE nametag- see below)
* Send brief announcement (background/bio/photo) to Cory for inclusion in monthly OUE newsletter
* Signed Equipment Loan Agreement form on file (in dept. and uploaded to OUE Unit Dropbox Folder) for any equipment to be taken off campus (laptop, mobile devices, etc.); New equipment noted in departmental database
* Flextime and/or Telecommuting paperwork uploaded to OUE Unit Dropbox folder (if applicable and appropriate- and supported by supervisor)
* Establish performance goals using GT Goal setting form (working with immediate supervisor and department director)\*\*
	+ Establish date for 6-month probationary review (at least 2 weeks prior to 6-month anniversary). It is also encouraged to set a check-in meeting (for example, after the first 2 or 3 months)\*\*

(**\*\**Goal Setting form is due to OUE within first month of hire or on annual performance evaluation deadline in February, whichever comes first; 6-month probationary evaluation form is due to OUE at least one week prior to 6-month anniversary of start date*)**

**GT Finance and OHR Documentation (complete within first month of start date except where noted)**

**Point Person: OUE’s Assistant Director for Admin Operations (****mysty.connelly@gatech.edu****)**

* Ensure OUE has updated and complete HR paperwork in files (signed offer letters, resume, etc.)
* Ensure employee is correctly setup in OneUSG Connect and WorkDay (where appropriate)

**OUE Overview**

**Point Person: Unit Administrative Professional & OUE Professional Development Committee**

* Review the OUE Admin Policy site. (<http://oueadmin.gatech.edu/>)
* Complete and sign OUE Staff Expectations Document <http://oueadmin.gatech.edu/hr-documentation-information>
* Review OUE departments (websites, brochures) and organizational chart (<http://oue.gatech.edu/>)
* Review other departmental/OUE/GT reports and info (GT Strategic Plan, IRP reports, etc.) as appropriate.
* Request access to appropriate OUE, Unit and Building listservs
* Schedule appointment for GT headshot photo at https://comm.gatech.edu/campus-resources/headshots
* Within first month, schedule 30-minute welcome meeting with VPUE during first month (for regular/permanent employees only- if appropriate) (*Work with Criss Miller, Asst. to AVP to schedule*)

**GT Policies and Training**

*(Note: all employees should familiarize themselves with these important policies Training classes are offered through OHR and New Employees can register for classes through GT’s online training website: (*<https://gatech.geniussis.com/PublicWelcome.aspx>*) Please note: classes are broken down into categories based on class type, administrative systems and certificate programs. Below is a list of policies new policies should familiarize with in the first 4 weeks of employment.* ***The OHR New Employee Orientation and FERPA tutorial are required of every new employee in OUE****.*

* Attend OHR’s new employee onboarding program (**REQUIRED**). Date(s) attended:

<https://hr.gatech.edu/new-employee-experience>

* OHR’s DiSC workshop is highly recommended (and required for OVPUE staff): Sign up here: *(*<https://gatech.geniussis.com/PublicWelcome.aspx> (DiSC: Flexing Your Style to Achieve Results)
* OneUSG Connect (<https://oneusgconnect.usg.edu/>)
* Payroll Information (<https://hr.gatech.edu/payroll#node-1419>) for Exempt Faculty & Staff.
* Workday (<https://gatech.geniussis.com/PublicWelcome.aspx>)
* Pcard (<https://procurement.gatech.edu/purchasing/pcard>)
* Travel (<https://www.procurement.gatech.edu/travel>)
* Business & Finance Policy guidelines (<http://www.policylibrary.gatech.edu/business-finance>)
* Information Technology Policy (<http://policylibrary.gatech.edu/information-technology>)
* Equipment Management Policy (<http://www.policylibrary.gatech.edu/business-finance/equipment-management>)
* Food/Group Meal Policy (<https://policylibrary.gatech.edu/business-finance/procurement-group-meals-employees-students-and-official-visitors>)
* Campus Alcohol Policy ( <http://www.policylibrary.gatech.edu/campus-use-facilities/campus-alcohol-policy> )
* Gift Card Policy (<http://www.policylibrary.gatech.edu/business-finance/gift-card-policy> )
* Telecommunications Policies: <https://policylibrary.gatech.edu/information-technology/telecommunications>

**OUE and GT Policies for Assessment, Data Management/Security, and FERPA**

All new employees should set up a 30-minute meeting with OUE’s Director of Undergraduate Analytics, Planning, & Assessment (Lacy Hodges) to review OUE’S assessment process as well as key policies on data management, security, and compliance.

* Review policies/memos on data security and compliance (<http://oueadmin.gatech.edu/assessment-outcomes-reporting-data>)
* FERPA Policy & Tutorial (<http://www.registrar.gatech.edu/faculty/formlanding/ferpaonline.php>) (**REQUIRED**)
* Reporting a phishing email: please forward suspected phishing messages as an attachment tophishing@gatech.edu. For more information: <https://stats.security.gatech.edu/phishbowl/>
* Meet with OUE’S Director of Undergraduate Analytics, Planning, & Assessment (Dr. Lacy Hodges lacy.hodges@gatech.edu) regarding OUE assessment process, data security, and data management
	+ Additional Training that suggested depending on position (Please note here)

**Signatures**

Sign below to verify that the above steps are completed. Return the signed form AND any documentation to OUE HR (oue\_hr@gatech.edu), including the OUE Staff Expectations Document, within 4 weeks of new hire start date (except where noted):

|  |  |  |  |
| --- | --- | --- | --- |
|  | Name (Printed) | Signature | Date |
| Employee |  |  |  |
| Employee’s Supervisor |  |  |  |
| Department/Area Director |  |  |  |
| OUE Director of Undergraduate Analytics, Planning, & Assessment | Lacy Hodges |  |  |
| OUE Administrative Contact | Mysty Connelly |  |  |