**OUE New Employee Onboarding 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.)
  + Request office keys
  + Update all department office/suite directory signage and office/workspace nameplate
  + Advise of any facilities/custodial needs
  + Update all building directories and/or building listservs
  + Ensure office is prepared, clean and ready for occupancy
* Contact appropriate IT personnel for the department (Clough, Success, French, etc.)
  + Advise of any IT needs,
  + Ordering computer (with supervisor approval) and/or other office technology such as monitors, printers, etc.
* Create first day schedule, send welcome email, parking information, and schedule 1-2 days prior to first day
  + [HR appointment](https://gatech.service-now.com/booking?id=csm_online_walkup_experience); pick up BuzzCard; provide two forms of ID
  + Meet new employee upon arrival, walk to office
  + Lunch with supervisor and/or members of team
  + Meetings (as appropriate) with department
  + Orientation activities and meetings
  + Provide overview and schedule for first week

**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 departing employee information has been removed).*

* Verify employee information in GT online Directory is accurate (employee title, office, and campus phone #)
* New employee should share Office 365 calendar access with administrative professional and appropriate individuals in department (per department expectations)
* Order business cards and any departmental name tags or materials (OUE will handle OUE nametag- see below)
* Send brief announcement (background/bio/photo) to Communications (Cory Hopkins) for social media post and inclusion in monthly OUE newsletter
* Send new employee the Equipment Loan Agreement form; upload signed form and keep 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
* Employee must complete the [Flexwork Arrangements](https://hr.gatech.edu/working-tech-arrangement) flextime agreement and submit it to their supervisor [per GT policy](https://policylibrary.gatech.edu/employment/flexwork-arrangements).
* Establish performance goals using [GT Digitized Performance Management system](https://ohr.gatech.edu/performance-management) (working with immediate supervisor and department director)\*\* Upload goals into the Performance Management System.
  + - 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)\*\*
    - A copy of the supervisor approved performance goals is due to OUE (the Assistant Director of Administrative Operations) within the 30 days or on annual performance evaluation deadline in February, whichever comes first; the 6-month probationary evaluation form is due to OUE at least one week prior to the 6-month anniversary of the start date.

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

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

* Ensure OUE has updated and complete HR paperwork in files (OUE Staff Expectations Document, signed offer letter, resume, onboarding checklist, Performance Goals, etc.)
* Ensure employee is correctly setup in OneUSG Connect and WorkDay (where appropriate)

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

* Complete and sign OUE Staff Expectations Document
* Review OUE departments ([OUE website](https://oue.gatech.edu/)) reports and info ([GT Strategic Plan](https://strategicplan.gatech.edu/), [IRP reports](https://irp.gatech.edu/), etc.) as appropriate.
* Contact Communications and request access to appropriate OUE, Unit and Building listservs
* Schedule an [appointment for a GT headshot](https://comm.gatech.edu/campus-resources/headshots#:~:text=Headshot%20portraits%20for%20Georgia%20Tech%20faculty%20and%20staff,name%20and%20department%20name%20in%20the%20subject%20line%3A) photo
* Within first month, schedule 30-minute welcome meeting *with VPUE (for full-time, permanent employees) (Email Criss Miller, Asst. to AVP to schedule)*

**GT Training**

Training classes are offered through GTHR and New Employees can register for classes through GT’s online training website: <https://gatech.geniussis.com/PublicWelcome.aspx>.  *Classes are broken down into categories based on class type, administrative systems and certificate programs.*

* Attend [OHR’s new employee orientation program](https://pe.gatech.edu/wlpd/programs/new-employees#:~:text=As%20the%20first%20of%20many%20fun-filled%20interactions%20included,attend%20by%20email%2C%20after%20communication%20with%20their%20managers.) (**REQUIRED**). Date(s) attended:
* DiSC: Flexing Your Style to Achieve Result )workshop (required for OVPUE staff): Sign up here: *(*<https://gatech.geniussis.com/PublicWelcome.aspx>
* OneUSG Connect (<https://oneusgconnect.usg.edu/>)

**GT Policies**

All new employees must review and familiarize themselves with the following policies within the first 6 months of employment.

***The OHR New Employee Orientation and FERPA tutorial are required of every new employee in OUE****.*

* 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 Data Management/Security, and FERPA**

All new employees must set up a 30-minute meeting with OUE’s Director of Undergraduate Analytics, Planning, & Assessment (Dr. Lacy Hodges [lacy.hodges@gatech.edu](mailto:lacy.hodges@gatech.edu)) to review OUE’S assessment process as well as key policies on data management, security, and compliance.

* Review policies on [Data Governance and Management Policy](https://policylibrary.gatech.edu/information-technology/data-governance-and-management-policy) and the [Institution Online Resource Ownership, Control, and Use](https://policylibrary.gatech.edu/information-technology/institution-online-resource-ownership-control-and-use)
* FERPA Policy & Tutorial (<http://www.registrar.gatech.edu/faculty/formlanding/ferpaonline.php>) (**REQUIRED**)
* For information about phishing emails: <https://stats.security.gatech.edu/phishbowl/>
  + Report phishing emails by emailing the suspected email to [tophishing@gatech.edu](mailto:tophishing@gatech.edu).

**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](mailto: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 |  |  |