<u>ONBOARDING NEW EMPLOYEES GUIDE</u>

Once your new employee accepts the offer from HR Employment Specialist, you and your new employee will receive a Welcome Letter along with their Offer Letter, Benefits Guide and Rates, Wellness Program Information, I 9 (payroll setup), Campus Map and an Invitation to a New Hire Orientation. If you do not see the divisional HR administrator copied on that message, please forward it to elizabeth.wilkes@case.edu.

Before the Start Date

- Send a welcome note or give your new employee a call to share the following:
  - Your contact information
  - Exact directions to their new office
  - Agenda for their first day
  - Ask if they have any questions
- Send an announcement message out to the department welcoming your new hire. Be sure to include information about their background and position.
- Prepare their office space
  - Assure office is clean
  - Equip office with basic office supplies
  - Create an office nameplate
- Prepare their computer
  - Contact Utech: 368-1959 or sasupport@case.edu
  - Let them know the arrival date of your new employee
  - Order new computer if needed
  - Request a reformat of an existing computer
  - Prepare a list of websites your employee may need access to – UTech can then help your new employee create a Favorites Bar allowing them quick access to links that will immediately help them with their job. For example (HCM, Campus Groups, Student Affairs Directory, Student Affairs website, and UTech online services and links)
- Prepare their telephone
  - Contact Utech: 368.1959 or help@case.edu
  - Order a new phone if needed
  - Reformat an existing phone – contact Telephone Services https://case.edu/utech/telephone-services/
  - Download – User Guide for Cisco Phones https://case.edu/utech/help/knowledge-base/office-phones/telephone-services-information/user-guides-ip-and-analog-phones
- Prepare their mobile phone (if needed)
  - Mobile Phone purchases must be approved by the Vice President of Student Affairs
  - Check with Utech for compatibility issues
  - To order a mobile phone and a mobile phone plan, https://case.edu/utech/telephone-services/mobile-phones/ Contact Utech: 368.1959 help@case.edu to set up a new phone.
- Create an Agenda for their first day
  - Prepare a work agenda for the first day to get your new employee started on a project or task.
  - To get your new employee off to a good start, you should plan on spending a good part of the day with them.
- Set up an Orientation Folder to include:
  - Job description
  - Department and Division Organizational Chart
  - Division Strategic Plan
  - Division Core Values
- Order a name tag and, if needed, business cards to be printed through Printing Services.

- Order through the CWRU FedEx online portal: https://www.fedex.com/en-us/office/psg/cwru.html. An online proof will be generated for your review and once approved will be routed for production. You will not receive an additional hard copy proof. Payment is rendered by providing your speed type number at checkout.
- For more information, visit the printing services website; https://case.edu/printing/

First Day

HR New Hire Orientation is typically offered every Monday, which should coincide with your new employee's start date. Topics covered in that orientation are New Hire Paperwork, Intro to CWRU Policies and Procedures, Diversity and Inclusion, Workplace Safety/Hazard Training, Compliance, CWRU Police and Security, Wellness, Computing at CWRU and Benefits Program.

Please note Human Resources will not issue an ***Employee ID* until the day the new employee attends Orientation.

- Employee ID - Access Services
- Key Access (You must be authorized to request a key)
  - The request must be approved by Doreen Thibodeau
  - Make sure you have an employee network ID, building/office and key code. https://uservices.case.edu/KeyManager/
- Building Access
  - An access request must come from the person authorized for your area. For Student Life departments which are in buildings other than Veale Convocation Center / Wyant Fieldhouse, Thwing Center, or the Tinkham Veale University Center, please submit the request to Doreen Thibodeau (dat13). The facility coordinator in the exception buildings can submit on those departments' behalf.
  - The Supervisor/Director should send an email with the new employee's employee ID, network ID, and building access hours for your employee to those designated contacts.
- Computers/Telephone/Software
  - To request computer use, computer access, email and calendar setup for your new staff member. You can setup an appointment with [U]tech (368-1959) or help@case.edu or complete the "**New Staff Member Set Up"** form by going to https://uservices.case.edu/U/Support/ , then scroll down to find the "New Staff Member Setup" link, which is under the online forms section. **O**n the form you can set an appointment time for [U]tech to stop in and set up your new employee's computer.
  - Walk the new staff member through how to set up voicemail, forward their phone, and the basic functions of the phone and how it should be answered.
- Access to PeopleSoft Financials (if applicable)
  - Any new employee that is required to work with financial matters will need access to PeopleSoft Financials.
  - To request access, a person who currently has access in your department or someone from the Operations Team/Finance can assist you.
  - Go to PeopleSoft Financials / Online Security / New Security Request. Fill in the network ID and select the module to which the employee needs access.
  - Access to financial reports is requested through this process as well.
  - Every staff member should be able to process their own Travel & Expenses (T & E) reimbursement. Anyone with access to Peoplesoft can set them up - PeopleSoft/Financials/Security you must have their network id. Operations Team - Finance can assist. No training is needed if they just have access to this module. In order to use all modules, the new employee must first take a series of training classes.
  - Full access to PeopleSoft Financials (other than T and E) will not be granted until CAPS Courses are completed. PeopleSoft – To find the training classes http://case.edu/utech/caps/financials/
- Human Capital Management (HCM)
  - The employee's personal information should be verified as correct and completed in each tab, except for benefits.
  - An employee's office contact information will not show up in the University directory if it is not in the HCM profile.

  - It is required by state and federal law that an employee's time is recorded. Show your new staff member how to enter their time in HCM. It is recommended that this be done at least once a week especially if they have taken sick or vacation time or worked overtime.
  - Review general TRC codes and for the first month they must add a line for each day they work.
  - As their supervisor, assure you can approve time. If time approval is not available contact elizabeth.wilkes@case.edu

First Week

Below is a list of items that will help your new employee get a sense of Case Western Reserve University (CWRU) and where they work, who they are working with, and a better understanding of their position. This is offered as a helpful guide.

Getting to know the department

- Office tour – may want to include a small gift in their new office (plant, coffee cup, picture frame with mission statement)
- Meet the staff – may want to have a light breakfast or lunch to bring everyone together and celebrate your new employee. Please ask everyone to come in a few minutes early so everyone is there to greet the new employee.
- Bathroom locations
- Kitchen and coffee supplies
- Staff mail – explain the mail system at CWRU, how they will receive mail, their current campus address and location codes.
- Office supplies
- Copier, printer and scanner use

Department Policies and Procedures

- Review when employees are expected to start and end their work day.
- Discuss the process for calling in sick and requesting vacation time and ask if they have any questions about accruing this time.
- Discuss pay, overtime, importance of being on time and tracking their time in HCM.
- Review work attire and "Spirit" Fridays.
- Review lunch policies – does it need to be scheduled and how long they can take. Tell them about several places they can get coffee or lunch that are close to their office location.

Success on the Job

- Review new employee job description.
- Explain the Employment Orientation Period Procedure and review the Staff Orientation Evaluation.
- Discuss how the new employee fits into the department / division / university.
- Review the first assignment with your employee.
- Schedule a first meeting and feedback session.
- Setup a recurring meeting to make sure your new employee is on task and adjusting.
- Review your department's customer service policy, and who your "'customers" are.
- Review any type of reports your new employee will be responsible for.

Getting to Know CWRU and its Community

- Request they go into CampusGroups (community.case.edu) and show them how to go to the Division of Student Affairs/People. Pull up their name – ask if they can upload a picture and write a short bio.
- Give them a tour of your building and introduce them to their neighbors.

- Make sure your new employee has met with a member of the PDC and received a "new employee gift bag." The PDC will also be sending your new employee a welcome letter.
- Review the CWRU Homepage - Go to the top right corner where it says "Staff" this page has so many helpful links. You may want to do an overview of this page with them.
- Check to see if they are receiving The Daily.
- Acceptable Use of Information Technology Policy (AUP) – FAQ.
- Review University Emergency Procedures – ALICE Program, Safe Ride, Campus Police (368.3333)

Classes

- New Supervisor Orientation - The New Supervisor Training Program is a year-long program designed for supervisors who are new to their role – either recently promoted or newly hired supervisors – who have no prior supervisory experience. All staff who have recently started their first CWRU supervisory are welcome to attend, whether or not they have previous supervisory experience. This includes external hires, internal hires, and internal promotions. If you have any questions, please contact the Professional Development Center or askHR@case.edu

90 Days and Beyond

- Check in with your new employee on a daily basis – 10 minute updates or weekly one-on-ones.
- Make sure you follow-up to assure they have their key, telephone, name tag, etc.
- Complete the "90 Day Staff Orientation Evaluation" forms." Please contact elizabeth.wilkes@case.edu if you need copies.
    - 1 Month Review (30 Days)
    - 2 Month Review (60 Days)
    - 3 Month Review (90 Days)
- Before completing this form supervisors should review the HR Policy Manual regarding Employment Orientation Period. Both parties should go over each evaluation and sign off on the bottom of the form. A copy of each evaluation should be given to the employee and sent to elizabeth.wilkes@case.edu. She will retain a copy in the employee's department file and forward a copy to HR for the employee's permanent file.
- If there are major concerns, you may want to speak to your supervisor and Employee Relations, especially if termination is a possibility. Make sure you do this at least 2 weeks before their 90 working days are complete.
- After 90 days go over the employee's goals and objectives for their first year of work.
- Review the annual performance review process so the employee understands how you will evaluate their work.