OMF Onboarding Checklist for Business Operations Operating Bureau Personnel Administration (OBPA) Customers

This checklist augments the City's Onboarding program and is organized to help hiring managers served by Business Operations to prepare for the arrival of new employees. Tasks are grouped by responsible party and then by items that should be completed prior to the employee's first day versus items that should be completed on their first day or shortly thereafter.

Completion of the entire checklist will be the responsibility of the hiring manager. The checklist should be completed within four (4) weeks of the employee's start date.

Onboarding Checklist content information

The first section contains items to be completed by the hiring supervisor or manager, or delegated by them to other individuals.

The second section contains items that will be "owned" by an administrative or hiring support person and also allows for delegation of items (such as to an OBPA, Onboarding Peer, etc.) The hiring manager will assign this second section to the person who should own this part of the process and instruct them to complete and/or delegate items, as appropriate.

The third section is a checklist for the new employee. Hiring Managers will provide a link to this checklist to the new employee on their first day of employment, follow-up to assist with tasks as needed, and verify completion.

Step #1

At least two (2) weeks prior to employee hire date, the hiring manager provides the OBPA with a signed offer letter and a completed certification list, as well as communicates who will act as the administrative tasks owner. The OBPA will create a new onboarding checklist for the new employee and will email a link to the document on the shared drive to both the manager and the administrative tasks owner.

Step #2

The manager and administrative tasks owner will determine which items they will complete and which items will be delegated and to whom. They will be responsible for adding the name of the person they are delegating a task to on the appropriate column within the checklist, as well as sharing the link to the document to those people, via email.

Each task owner will then check off items within the document electronically, helping to keep everyone on the "same page".

Step #3

Once the administrative tasks owner's list is complete, they will notify the hiring manager/supervisor. Hiring manager/supervisor will notify the OBPA, who will verify document is complete, remove it from the common drive, and place a copy of the document in the employee's personnel file.

Supervisor/Hiring Manager Responsibilities

Employee's Name: _____ **Start Date:** _____

PRIOR TO EMPLOYEE'S FIRST DAY	OWNER (IF OTHER)	Date
Have employee sign *Contingent* Letter of Offer to include classification, salary (hourly rate), work hours, work location, and employee onboarding website. Include a Vacation Accrual Authorization Form (if applicable).		
Process a Criminal History and Reference check (This could take a week to get results). The manager will decided additional checks.		
Have employee sign *revised* Letter of Offer to include classification, salary (hourly rate), work hours, work location, and employee onboarding website. Include a Vacation Accrual Authorization Form (if applicable).		
Send a copy of the signed revised Offer Letter, valid, signed and completed Certification List to the OBPA **two weeks** prior to the start date.		
Notify Division Manager new employee start date.		

Identify all software/systems access needs, for example:
 	
    SAP (work with change agent)
    BRASS (work with CBO)
    Pattern Stream
    HP Records Manager
    Paper Port
    Caseware
    • Determine which roles are needed
    • Assign applicable training on employee's milestones goal sheet (Include official CityLearner title and next available date)		

Coordinate submission of the Technology Service Request form including the software listed above and get workstation set up (Administrative Task)		
Review related onboarding procedures in the Managers and Supervisors toolbox at: https:\\www.portlandoregon.gov/bhr/onboardingtoolkit.		
Confirm requested systems and software are available on assigned PC (per supervisor)		
Submit Employee Setup request to BTS via Cherwell; mapping to applicable network drives, Outlook email, distribution lists, Portland Online, etc.		
If employee will need to access HP Records Management, request access from Archive Department.		
Delegate:		
• To Communications (update organizational chart and post online, if applicable) & give copy to new employee		
• To Administrative Owner (see tasks attached)		
• To Bureau Change Agent: Assign SAP roles & training (see above)		

FIRST DAY OR ASAP	OWNER (IF OTHER)	Date
Staff introductions		
Send an announcement via email to the bureau, announcing the new hire and start date		
Discuss SAP Roles and assigned training required/requested by Change Agent		
Discuss OMF Business Operations Employee Expectations (and Supervisory Expectations, if applicable)		
Explain process for requesting time off & unexpected absences (sick, etc.)		
Explain use of cost objects for tracking time, expenses, revenues, etc.		
Forward appointments for BusOps Division Staff Meeting and other applicable team meetings, etc.		
Provide copy of Employee portion of this New Hire Checklist for employee to complete and return to you.		
If employee is considered an "Essential Employee" as defined by OMF Continuity of Operations Planning, provide them with a status of essential employee memo		
OMF Supervisors must review the OMF COOP with new employees during their orientation. http://www.portlandoregon.gov/omf/64926		
Provide the following for employee to review: • Provide Business Operations, OMF and City organization chart of Bureaus by Commissioner, Acronym list		
Show how to access CityLearner to sign up for assigned trainings (see list of trainings on Employee's task list)		
Show how to update emergency contact information and other information in ESS.		
Order P-Card, if needed		
OTHER, If Applicable: • Sign up for trainings specific to assigned SAP roles (eLearning or classroom) • BRASS Basics • Budget and Budget Monitoring Process • Pattern Stream Publishing Software • Bank of America Works		
Provide the following items for employee review: • Overview of Portland City government • OMF Strategic Plan • OMF policies • CAO's Plan for OMF (current fiscal year) • HR Administrative Rules		

Administrative Responsibilities

Employee's Name: _____ **Start Date:** _____

Administrative Responsibilities Owner: _____

Prior to Employee's First Day	Owner (if other)	Date
Schedule time for new employee processing of following forms Date & Time scheduled:	Katy	
• Determine if PAR or OM needed	Katy	
• Complete SAP PA action	Katy	
• Complete I-9 Employment Eligibility Verification Form	Katy	
• Complete W4 Form	Katy	
• Complete Direct Deposit sign up (need voided check)	Katy	
• CoP Employee Info Form	Katy	
• HR Administrative Rules acknowledgement, including 4.03 Fragrance Free Workplace	Katy	
• Mandatory Child Abuse Reporting Training and Information	Katy	
• Respectful Workplace Behavior brochure	Katy	
• Records Security Form signed	Katy	
• Work Schedule Form	Katy	
• Race/Ethnicity & Veterans Status Form	Katy	
• Self-identify Disability Status (if applicable) • Provide ADA accommodation (if applicable)	Katy	
• Transit Benefits Information (if applicable)	Katy	
• CityShape Membership Form (optional)	Katy	
• Give resource binder	Katy	
Set up Business Operations personnel file, including Personnel File checklist	Katy	
Request ESS setup from Change Agent		
Set up Employee Bureau Training File	Katy	
Update floor seating chart & print copy for employee's first day	Katy	
Ensure scans of final posting language, certification list, and signed offer letter are in BO Common personnel folders		
Set up new employee's workspace		
Update phone list & print copy for employee's first day	Julia	
Explain/Review timekeeping entry in ESS	Timekeeper	
Schedule ergonomic assessment	Sharon	

FIRST DAY OR ASAP (MEET WITH EMPLOYEE TO COMPLETE THE FOLLOWING)	OWNER (IF OTHER)	Date
Refer employee to city benefits information: http://www.portlandoregon.gov/bhr/benefits • Packet will be mailed to their home within 2 weeks • Benefits orientation held on the first Tuesday of each month during the lunch hour • OPSRP Training & PERS trainings held monthly during the lunch hour		
Provide map of City of Portland		
Give employee their PRNR number	Katy	
Print this form- put it in personnel file and delete from common drive	Katy	
Provide brief introduction to The Portland Building		
Give department tour (bathrooms, water cooler, kitchen/lounge)		
Provide 12th floor emergency plan & show evacuation route		
Explain office supplies – location, how to order		
Explain location and name of b/w and color printers and code(s) for using them		
Demonstrate how to use copier and make pdf/scan		
Explain recycling & trash facilities on the floor		
Demonstrate how to use Outlook for common bureau functions, if needed: • Scheduling conference rooms • Sharing calendars • Scheduling bureau-wide events • Accessing online phone list/employee search • Setting up standard email signature		
Explain interoffice mail codes and show mail boxes		
Assist with set-up of PortlandOnline account, show bureau website and personal and Common Drives		
ID Security Access Form		
Confirm employee is listed in copier database	Sharon	
Order Name Plate	Sharon	
Order business cards		

Employee Responsibilities

Employee's Name: _____ **Start Date:** _____

FIRST DAY OR ASAP	Date
Set up PortlandOnline Account and view Employee Self-Service options	
Sign up for benefits within first 30 days at : http://www.portlandoregon.gov/bhr/benefits • Packet will be mailed to your home within 2 weeks, but all information is also available online • Attend New Employee Benefit Orientation - first Tuesday of each month, See email for actual date, time and location. • PERS (retirement system) trainings held monthly during the lunch hour	
Add emergency contacts to ESS and notify supervisor when completed	
Sign up for required trainings via ESS/CityLearner. (See below)	
Set up voicemail greeting	

TRAININGS VIA CITYLEARNER	Date
BHR Summary of Trainings list: http://www.portlandoregon.gov/bhr/article/42092? (Managers & Supervisors or Non-Management Employees)	
REQUIRED FOR ALL EMPLOYEES:	
Sign up for Mandatory to Report Child Abuse	
Sign up for HR 2.02 Workplace Harassment (note Managers/Supervisors have different HR 2.02)	
Sign up for Defensive Driver Training	
Take Modules 1, 2 & 3 of New Employee Onboarding	
RECOMMENDED FOR ALL EMPLOYEES:	
Sign up for Equity Training 101 for City Employees	
REQUIRED FOR MANAGERS & SUPERVISORS:	
Sign up for Manager/Supervisor Training Series: • Conflict Management • Emotional Intelligence • Ethical Leadership • Performance Management	
Sign up for Performance Evaluation Training	
Sign up for Cultural Competency for Managers and Supervisors (CCMS)	
Sign up for Discipline Training	
Sign up for Reasonable Suspicion of Drug and Alcohol Use Training	
E-LEARNING:	
ESS Employee Self-Service Resources	

CityLearner Overview Materials	
SAP Intro to SAP eLearning	
SAP Basic Navigation eLearning	

ITEMS TO REVIEW	Date
Overview of Portland City government	
Review OMF Strategic Plan Date	
Meet with key customers, stakeholders, and program partners	
Review 12th floor emergency plan	
Review OMF policies	
Be familiar with HR administrative rules	
Review Archiving & Records Management/Retention information at: http://www.portlandonline.com/auditor/index.cfm?c=51813	