Process of On-Boarding New Staff

Candidate identified

- Offer Letter sent
  - Internal?
    - Yes
      - Offer Packet sent
    - No
      - Offer Packet sent

- VP Welcome Letter sent

- VP office notified of hire

- Internal checks
  - Internal?
    - Yes
      - Welcome Packet sent
    - No
      - Welcome Packet sent

- One Month
  - Survey review one-on-one

- Three Month
  - Evaluation email to supervisor

- Six Month
  - Staff scheduled for check-in
  - Survey email to new staff

- One Year
  - Announcement from supervisor posted on intranet

*Staff member is scheduled to attend UA 101 – A division-wide orientation program held every other month. A survey is completed by staff member at the end of the all-day session.
Exhibits to Flow Chart

1. Offer Packet Includes:
   - Offer letter
   - Intellectual property policy and form
   - Form W-4 (employee’s withholding allowance)
   - Form I-9 (employment eligibility verification)
   - Email address form
   - Emergency contact info
   - Government contractor form
   - Benefits overview
   - CMU at a glance
   - American Express form (if applicable)

2. Office Space:
   - Paperwork forwarded to Assoc. Director OD/HCM
     - Discuss location w/Associate VP Adv. Services
     - Info forwarded to AIS to order email account
     - Order sign for office
     - Request ORACLE access (if applicable)

3. Phone & Computer Ordered:
   - AIS Form identifies:
     - Computer equipment needed – PC type
     - Software to be installed
   - Contact phone provider if new account to be activated

4. System Updates
   - Position marked as filled in TMS
   - Position removed from UA intranet
   - Incumbent entered into HREM or updated if internal
   - Incumbent linked to position in TMS
   - Incumbent given access to UA intranet
     - Email sent to incumbent – Welcome & request to complete bio & have picture taken

5. VP Office Notified:
   - Position – filled
   - Applicable info - internal or external
   - If new staff member was referral by current staff – thank you letter sent to current staff

6. Internal Checks:
   - Hiring Manager sent:
     - Suggested orientation checklist – include new tools – core competencies
     - Assist hiring manager and department liaison with department specific orientation
     - Sample first weeks agenda
     - Request for staff member to be scheduled for a 30-minute UA intranet overview
     - Request announcement for UA intranet
   - Assoc. Director OD/HCM:
     - HREM entry – fax & send forms to payroll
     - Order Benefits Orientation Packet
     - Notifies VP office of date for birthday lunch
     - List of ambassador volunteers reviewed for new staff member
     - Email sent to volunteer
     - When confirmation received - document created to send with Welcome packet
     - Welcome sign given to dept for signatures

7. Welcome Packet Includes:
   - (a) Internal:
     - Guiding principles
     - First Day information
     - List of useful staff & contact info
     - Organizational Chart w/ name included
     - Advancement Ambassador Info
   - (b) External items above plus:
     - Campus map
     - Paid time off information
     - Parking Application
8. Day One Activities
   • New staff member meets with Assoc. Director OD/HCM
     • Forms to be distributed and/or completed:
       • Payroll direct deposit
       • WTEX tax form
       • EMS Tax Status
       • Direct Deposit for Reimbursement
       • CMU I.D.
       • PPG I.D.
       • Parking application
       • PTO form
       • Attendance Card (if applicable)
   • Provide Benefits Orientation Packet
   • Review Major Benefits and highlights
   • Campus Directory
   • Campus Map

9. One Month
   • Check in scheduled with Director OD/HCM or Assoc. Director
   • OD//HCM conducts one-on-one satisfaction survey with new staff

10. Three Month
   • Email sent to supervisor with provisional review form, request that they initiate with new staff a conversation about job performance

11. Six Month
   • Survey to staff member
   • Evaluation to manager

12. One Year
   • Notification sent to manager to recognize staff member’s one-year anniversary