



**START**

New Employee Orientation –  
It's More Than Just Forms!

 Sharon Harris  
Human Resource Senior Consultant

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**AGENDA**

- Hire-to-Retire (H2R): Program Review
  - Why should I care?
- New Employee Orientation:
  - New Hire Documents
  - Benefits
  - Handbook / Policies to Cover
  - Where to File Personnel Documents



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Hire to Retire (H<sub>2</sub>R): Program Background



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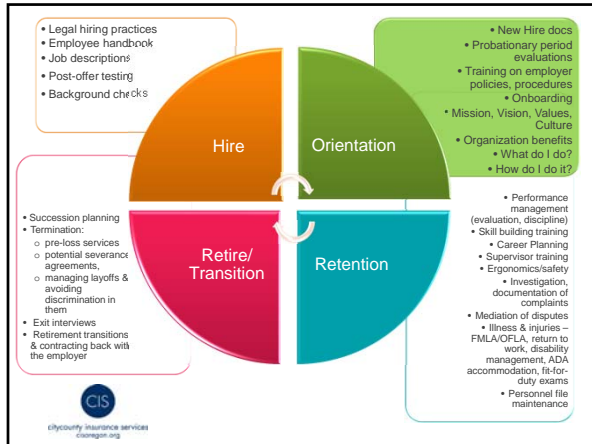
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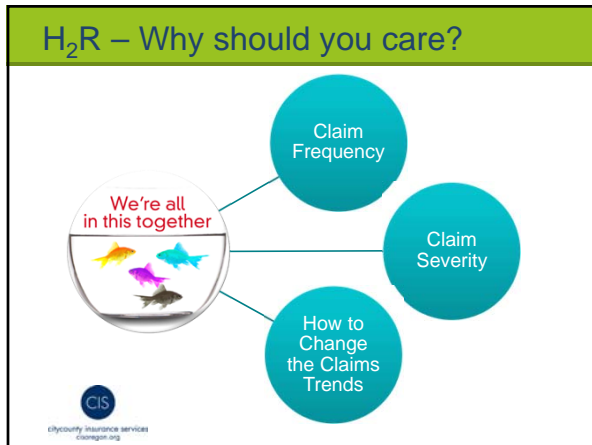
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### New Employee Orientations

What is the Big Deal?



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### New Employee Orientation

- Time for new employee to familiarize themselves with:
  - the organization
  - the department
- Time for employee to ask questions



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### New Employee Orientation

Employee confirmation that he/she made the RIGHT decision



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### Who's responsibility is it?

- Managers
- Human Resources
- Risk Management
- City Recorder / County Clerk




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### Before the Employee Arrives

- Schedule out the first week...
- HR and Manager should schedule the week together

NEW EMPLOYEE ORIENTATION - RESPONSIBILITY GRID			
Before your First Day	Your First Day	First Week	First Month
<ul style="list-style-type: none"> <li>Review orientation materials provided to you by your manager/leader.</li> <li>After completion of other check your personal area for check.</li> <li>Review orientation forms to receive and complete forms.</li> <li>Log on to the Intranet/HR and check the State Information Guide.</li> <li>Read the Handbook - read and complete all forms. Sign and send back forms to HR.</li> </ul>	<ul style="list-style-type: none"> <li>Review your orientation materials with your Manager/leader.</li> <li>Discuss with your Manager/leader any questions you have.</li> <li>Complete orientation forms.</li> <li>Log on to the Intranet/HR and check the State Information Guide.</li> <li>Understand your role and responsibilities.</li> <li>Check schedule.</li> <li>Use "welcome" sign.</li> </ul>	<ul style="list-style-type: none"> <li>Complete New Employee Training - check back on day 2.</li> <li>Complete orientation forms.</li> <li>Complete orientation materials.</li> <li>Complete orientation materials.</li> <li>Complete orientation materials.</li> <li>Complete orientation materials.</li> <li>Complete orientation materials.</li> <li>Complete orientation materials.</li> <li>Complete orientation materials.</li> <li>Complete orientation materials.</li> </ul>	<ul style="list-style-type: none"> <li>Review orientation materials.</li> <li>Complete orientation materials.</li> <li>Complete orientation materials.</li> <li>Complete orientation materials.</li> <li>Complete orientation materials.</li> <li>Complete orientation materials.</li> <li>Complete orientation materials.</li> <li>Complete orientation materials.</li> <li>Complete orientation materials.</li> <li>Complete orientation materials.</li> </ul>




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### The Role of Human Resources




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### Enrollment & Beneficiary Forms

Medical Vision  
Dental  
FSA  
VEBA MSA  
HRA  
Life Supplemental Life  
ADD  
Dependent Life

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### Enrollment & Beneficiary Forms

<b>PERS</b>	<ul style="list-style-type: none"><li>• Tier 1 &amp; 2</li><li>• OPSERP/IAP</li></ul>
<b>Employee</b>	<ul style="list-style-type: none"><li>• 6%</li></ul>
<b>Deferred Comp</b>	<ul style="list-style-type: none"><li>• 457</li></ul>

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### Benefits

Summary Plan Descriptions  
Sample Claim Forms (FSA)  
COBRA Notice  
RBH Employee Assistance Program

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## Benefits

- Benefit Enrollment and Beneficiary Forms
- File in a Confidential or Benefit File

The screenshot shows a web-based form titled 'Dependent/Beneficiary Entry'. It is divided into several sections:
 

- General Information:** Includes fields for Address Number (0000), Gender (Males, All), and Date of Birth (12/12/1987).
- School Information:** Includes High School Location (dropdown), Full Time Student (checkbox), and School Standing (dropdown).
- Other Information:** Includes Disability Flag (checkbox), Date of Disability (dropdown), Date of Medicare (dropdown), Date of Death (dropdown), Social Security Number (SSN) (dropdown), and Date of Termination (dropdown).
- Related Employees:** Includes Employee Identification (0000) and a dropdown menu.




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## The Employee Handbook

# Policy




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### Essential Policies to Cover

- Non-Discrimination and Retaliation
- Drug and Alcohol Policy

### Acknowledgment Form

- Have separate acknowledgment forms for each of these policies
- File in employee's Personnel file




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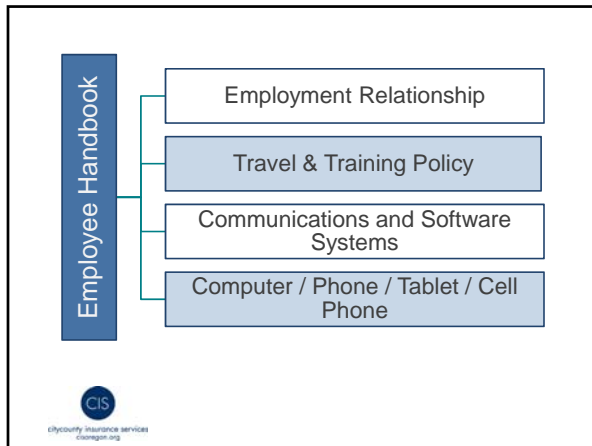
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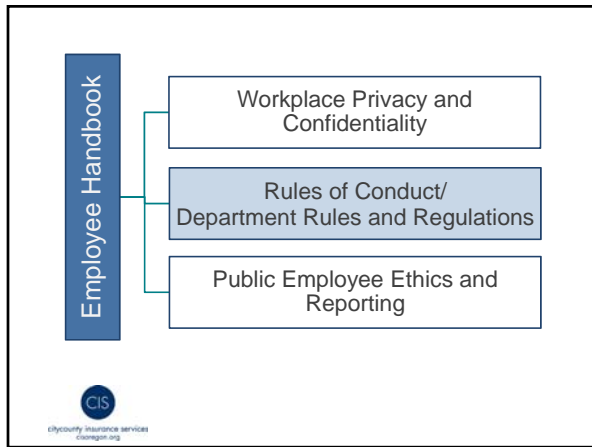
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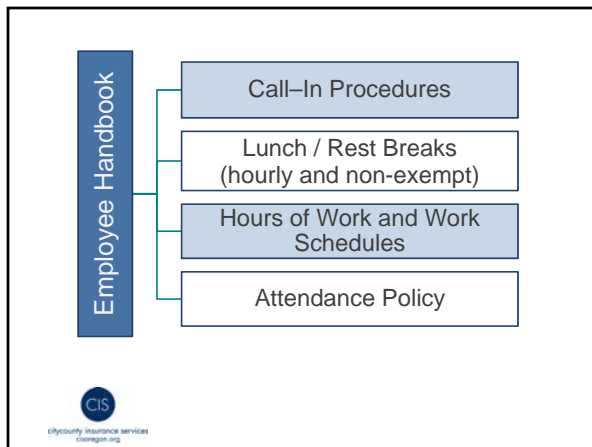
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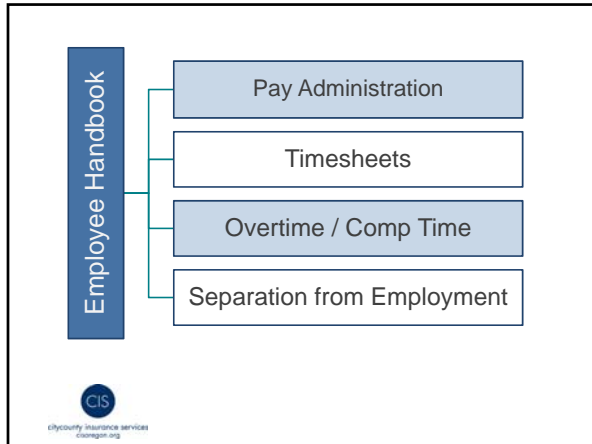
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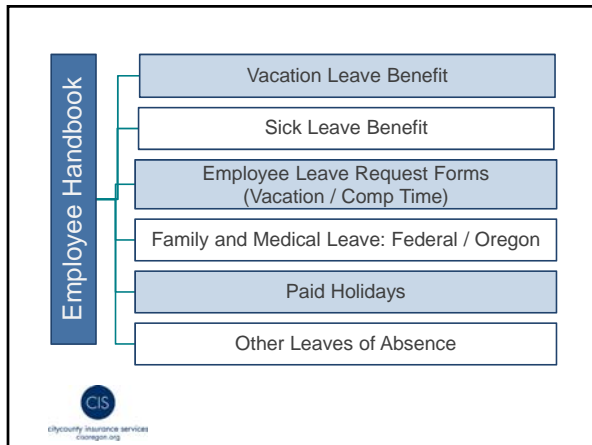
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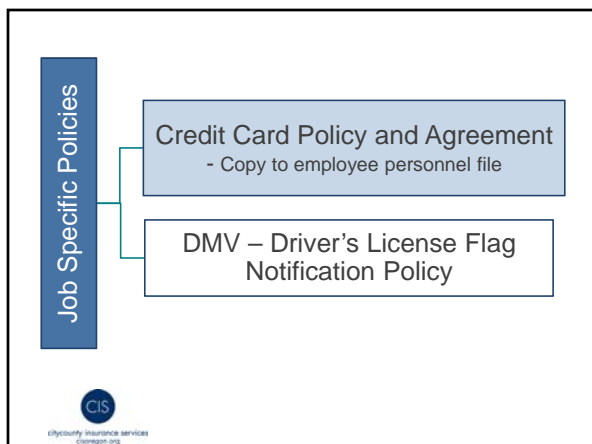
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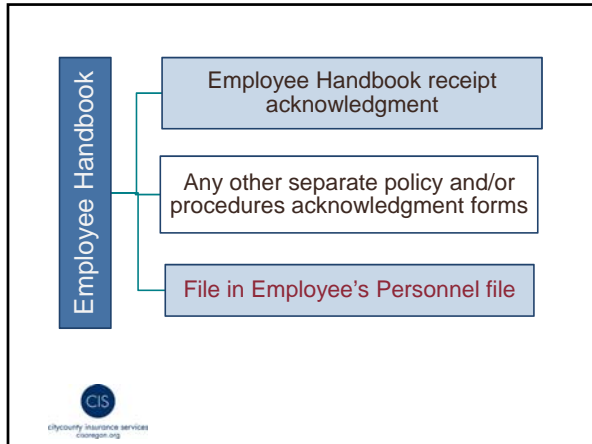
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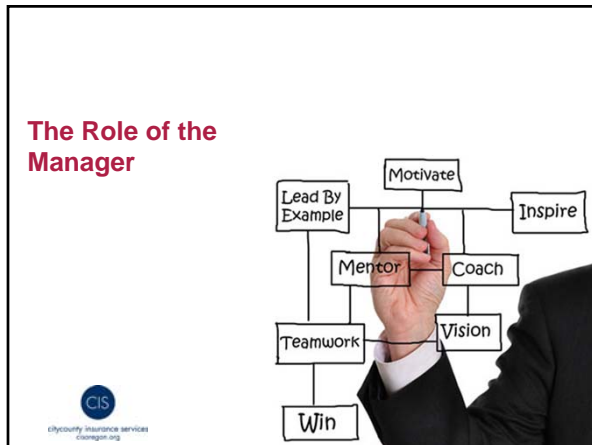
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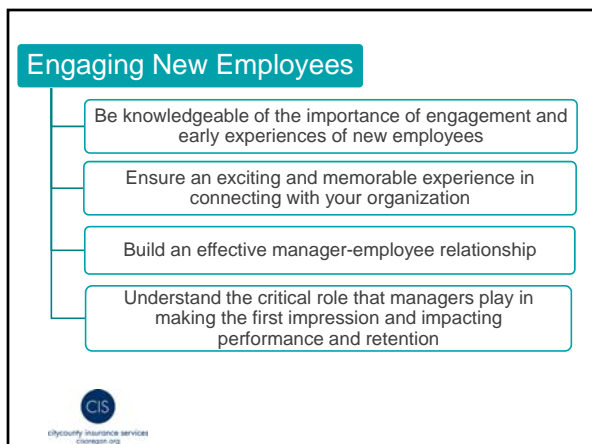
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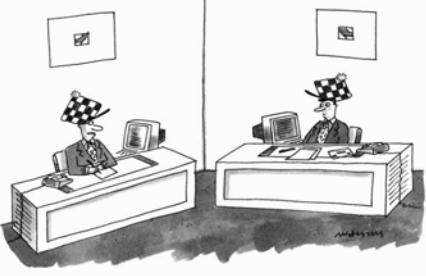
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### The Role of the Manager



*"I don't know how it started, either. All I know is that it's part of our corporate culture."*

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### Manager's Role

- Mission Statement
- Review job description
- Communicate job expectations
- Review organizational and department expectations
- Intro to Department staff
- Tour facilities



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### Manager's Role

- Phone / office / department directory
- Operation of phone and computer systems
- Access and authorization
- Department work schedule
- Department call in procedures



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## Manager's Role

- Trial Service Period
- Length of probation
- Evaluation during probation = Introduce the 3 month and 6 month review process
- Performance Review – annual
- Corrective Action



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## Manager's Role

### Equipment Sign-out

- I-D Badge
- Office / Building Keys
- Parking Permit/ Bus Pass
- Phone / Tablet / Laptop
- Uniform
- Tools



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"Mr. Osborne, may I be excused? My brain is full!"



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**The Role of Risk Management**



  
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**Risk Management / Safety Orientation**

- Employee Health & Safety
- Ergonomic Evaluation
- Safety Meetings
- Workers Compensation/ Incident Forms
- Emergency Exits and Procedures for all employee buildings



  
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**What's in Your File?**



  
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### What goes where?

- Personnel File
- I-9 Binder
- Confidential / Benefit File
- Confidential / Payroll File
- Confidential / Medical File
- Workers' Compensation File



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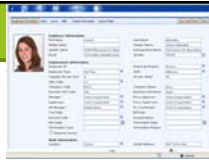
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### Personnel File

- ✓ Employment Application
- ✓ Conditional Job Offer Letter
- ✓ Acknowledgment Forms – Handbook, Harassment, Drug and Alcohol
- ✓ Performance Evaluations
- ✓ Formal Counseling / Discipline Documents
- ✓ Promotions & Transfers
- ✓ Personnel Action Forms ( PAF's)



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### I-9 Binder

- ✓ All employment eligibility verification forms (I-9) and any supporting documentation
- ✓ All employees in binder in alphabetical order by last name
- ✓ Make sure forms have been completely filled out by both employee and employer and that employment eligibility has been verified



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### Benefit File

- ✓ Employee Benefit forms
- ✓ PERS
- ✓ 457




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### Payroll File

- ✓ W-4 forms
- ✓ Direct deposit
- ✓ Payroll records
  - Payroll discrepancy forms
  - Hour and payroll reports




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### Medical File

- ✓ Doctor Notes
- ✓ Health Certifications
- ✓ Medical Diagnosis Information
- ✓ FMLA / OFLA Forms
- ✓ Medical Information Related to Leaves of Absence




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### Recruitment / Background Envelope

- Resume
- Letters of Recommendation
- Reference Checks
- Pre-employment Drug Test Results
  - Safety sensitive positions only
- Criminal Background Check
- DMV Check



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### Confidential Folder

What's not on the list...?

➤ Put in confidential folder inside the personnel file



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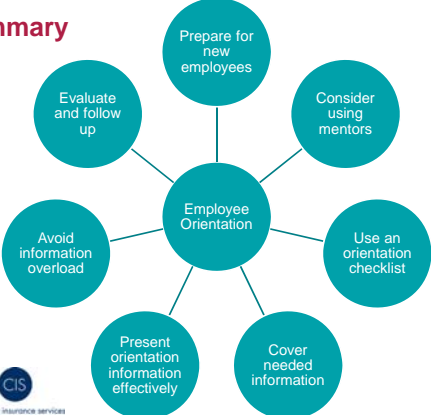
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### Summary



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# Questions?



*Do not be afraid to ask dumb questions.  
They are easier to handle than dumb mistakes.  
-- Unknown*



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## Next Webinar: Save the Date

October 22 | 10:00 -11:00 am  
"Establishing and Developing Team Performance"  
Presenter: Kurt Chapman, Sr. HR Consultant

To register at [learn.cisoregon.org](http://learn.cisoregon.org)



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## Thank You!

**Contact Information**  
Sharon Harris  
CIS HR Senior Consultant  
503-763-3843  
sharris@cisoregon.org



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