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Latest Version:	2.0	Revision Date:	03/07/2016
Effective Date:	04/11/2016	Replaces:	ISD Onboarding Process V1.0
Revised By:	Joshua Graves	Review Cycle/Date:	Annual
Reviewed By:	Fonda Logston	Reviewing Unit:	Enterprise Programs
Title:	Onboarding SOP		
Description:	This document is the operating standard for onboarding.		

Onboarding

Standard Operating Procedure

1. General Statement of Purpose
 - 1.1. The purpose of this document is to identify the process of onboarding.
2. Scope
 - 2.1. This document applies to the onboarding of all OMES IS employees.
3. Discipline
 - 3.1. Administrative Standards
4. Terms and Definitions
 - 4.1. Onboarding – The process of integrating a new employee into the workplace and its culture.
5. Instructions
 - 5.1. When a supervisor or manager hires a new employee, they must submit a **New Employee Onboarding** CRM Case at least five business days before the employee’s first day.
 - 5.1.1. This is done from the CRM Customer Portal by clicking **New Employee Onboarding** under Top Service Desk Requests on the Portal Home page and completing the onboarding form.
 - 5.2. After the New Employee Onboarding Form has been submitted, a CRM Case is created and assigned to a Service Desk Technician. Tasks are created automatically, based on the selections in the onboarding form, to establish the new employee’s access and to prepare their workspace. Common tasks include the creation of an Active Directory account, the creation of an email address, the creation of an Adobe Connection account, PC setup and phone setup. These tasks are sent to the appropriate service teams to be completed.
 - 5.2.1. Any specific access or software the new employee will need should be listed on the New Employee Onboarding Form in the appropriate text box.
 - 5.3. The hiring manager should complete the referenced **Onboarding Checklist for Supervisor** prior to the new employee’s first day. This checklist includes the following:
 - 5.3.1. Identify Security Needs
 - 5.3.2. Identify a Peer Mentor/“Ask Coach”
 - 5.3.3. Identify and Forward Weekly Meetings for 1st Week
 - 5.3.4. Identify Lunch Plan for Day 1
 - 5.3.5. Develop Week 1 Outline using template
 - 5.3.6. Prepare Desk Materials
 - 5.3.7. Have Executive Sponsor Send Email Announcing New Employee to OMESISDALL@omes.ok.gov using template
 - 5.3.8. Develop Week 2 Tasks Checklist using template

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- 5.4. On the new employee's first day, they will follow the Week 1 outline created by their manager.
- 5.5. On the morning of their first Wednesday, the new employee will attend OMES New Hire Orientation at the Jim Thorpe Building and cover the topics listed below:
 - 5.5.1. History and structure of OMES
 - 5.5.2. Timesheets
 - 5.5.3. Benefits
 - 5.5.4. Complete all new hire paperwork
 - 5.5.5. OPERS, Sooner\$ave, Pathfinder
 - 5.5.6. Health insurance
- 5.6. On the afternoon of their first Wednesday, the new employee will attend the OMES IS New Employee Orientation at the OMES Data Center. The new employee will receive the following at the OMES IS New Employee Orientation:
 - 5.6.1. OMES IS Security Badge for the OMES Data Center
 - 5.6.2. A copy of the Information Services New Employee Reference Guide
 - 5.6.3. CRM Tool training and login ID
 - 5.6.4. Detailed Time Entry Training
 - 5.6.5. Overview of each Service Team
 - 5.6.6. Overview of Change Management
 - 5.6.7. A copy of the Organization Chart
 - 5.6.8. Overview of Eclipse

6. Roles and Responsibilities

- 6.1. Supervisor/Manager
 - 6.1.1. Submits the online New Employee Onboarding Form.
 - 6.1.2. Completes the Onboarding Checklist for Supervisor.
 - 6.1.3. Prepares a schedule for the new employee.
 - 6.1.4. Sends email announcing the new employee to the team.
 - 6.1.5. Ensures equipment for employee setup before their start date.
- 6.2. Service Desk Technician
 - 6.2.1. Creates the onboarding tasks for the CRM Onboarding Case.

7. References

- 7.1. New Employee Onboarding Form – on the CRM Customer Portal
- 7.2. Onboarding Checklist for Supervisor
- 7.3. Onboarding Announcement Template
- 7.4. Week 1 Template
- 7.5. Week 2 Tasks Checklist Template
- 7.6. 02.3.1a OMES IS New Employee Reference Guide