

BURRELL COLLEGE OF OSTEOPATHIC MEDICINE

STANDARD OPERATING PROCEDURES

Onboarding and Separation		SOP #: HR.005.01
Effective Date	2/5/2019	
Last Revision/Review	11/30/21	

1. Purpose

This covers all faculty and staff employees at Burrell College of Osteopathic Medicine (Burrell) to establish onboarding and separation processes.

2. Related Policy/Authority

Burrell Employee Handbook

3. Faculty/Staff Responsibilities

This applies to all new hires at Burrell College Osteopathic Medicine and faculty and staff employees that are leaving Burrell College of Osteopathic Medicine. Both processes include staff from Human Resources.

4. Definitions/Abbreviations

GP = Microsoft Dynamics GP, the central financial administration system

Greenshades – web-based human resources management system

5. Procedural Steps

Onboarding

1. Once a candidate has been selected by the hiring supervisor, Human Resources sends out an offer letter and acknowledgement and authorization for background check.
2. Candidate signs offer letter and acknowledgement and authorization for background check and returns both to Human Resources.
3. Human Resources notifies IT via email that a new employee will be starting to include:
 - a. Employee name
 - b. Date of hire
 - c. Position title
 - d. Part-time or Full-time
4. Human Resources inputs the information for the background check.
5. Human Resources inputs the new employee into GP so that IT has the necessary information to set up email.
6. Human Resources Technician gathers all new hire paperwork into a packet. Depending on start date, the Technician will either give the paperwork to the Director of Human Resource Services or place it in the employee file cabinet in the "Future" file.
7. Human Resources coordinates with Assistant Dean of Administration/CIO and Facilities to ensure workspaces and technology resources are prepared for first day.
8. On the first day of employment, the Director of Employment will:
 - a. Goes over the packet of paperwork with the new employee to gather signatures.

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- b. Take the new employee to IT to have the new employee's picture for their ID badge and to obtain their email address and access to the system.
 - c. Assign the new hire training and the system will send an email to the new hire with the link to access the orientation videos.
 - d. Email new hire instructions to access Greenshades
9. Human Resources will provide strategic check-ins to new employees at the following intervals: end of first day, end of first week, 30 days, 60 days and 90 days.
10. Human Resources will provide learning sessions to employees on various topics bimonthly during the first 12 months of employment.

Separation

1. Once an employee submits their letter of resignation, the Executive Director of Human Resources of designee will contact the employee to set up an appointment for the exit interview.
2. If the employee has any benefits, they are cancelled with the appropriate last date.
3. Deductions are zeroed out in GP once the appropriate premiums have been withheld. If timing does not allow for the deductions to be zeroed out, a request is put through Finance to have the appropriate amount returned to the employee via check request.
4. During the exit interview, the Exit Interview form is given to the employee to complete.
5. Human Resources will go over with the exiting employee:
 - a. Annual Leave remaining balance
 - b. The date that any benefits signed up for will stop
 - c. The last pay date
 - d. 401(k) distribution form and special tax notice (if not already emailed to separating employee)
 - e. Forwarding address (if different from what we have on file)
6. The separating employee will turn in:
 - a. Keys
 - b. ID Card
 - c. Business Cards
 - d. Laptop
 - e. Any other items that were issued to the separating employee
7. After the last pay date, Human Resources will make the separating employee inactive in GP and file their employee file in the separated employee drawer.

6. Reports/Charts/Forms/Attachments/Cross References

Exit Interview and Exit Checklist

HR Forms: <https://burrell.edu/faculty-staff/forms/>

- Direct Deposit Form
- W-4
- Personal Data Form
- Conflict of Interest – Faculty
- Conflict of Interest – Staff

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- Greenshades Instructions
- Faculty Work Assignment

7. Maintenance

Human Resources; to be reviewed every January.

8. Signature

Signature on File

11/30/21

VP of Administration/CFO

Date

9. Distribution List

Internal/External

10. Revision History

Revision Date	Subsection #	Summary of Changes	New/Cancellation/Replacement Procedure? (if applicable)	Approval Date
11.30.2021	5	Added information about offering bimonthly training.		12.2.2021