Onboarding and Separation	SOP #: HR.005.02
Effective Date	2/5/2019	
Last Revision/Review	11/30/21, 9/8/2023	

1. Purpose

Establishes onboarding and separation processes for faculty and staff positions at Burrell College of Osteopathic Medicine (Burrell).

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 employment with Burrell College of Osteopathic Medicine. Both processes include staff from Human Resources.

4. Definitions/Abbreviations

HR – Human Resources (Office of)

GP - Microsoft Dynamics GP, the central financial administration system/ HRIS

Vector – Training Platform System

Greenshades – Web-based human resources management system and timekeeping

Onboarding Flow – Automated flow that initiate tasks to various departments and individuals.

Offboarding Flow – Automated flow that initiates offboarding tasks to various departments and individuals.

IT – Information Technology (Office of)

5. Procedural Steps

Onboarding

1. Once a candidate has been selected by the hiring supervisor, Human Resources sends out an offer letter and acknowledgement, job description and authorization for background check via email provided by candidate for review and signature.
2. Candidate signs offer letter and acknowledgement, job description and authorization for background check and submits them to Human Resources.
3. Human Resources notifies IT and Facilities via Help Desk ticket /New Employee Onboarding Flow 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
   e. Office/Workspace location

      f.   Other information specific to position needed for onboarding.

4. Human Resources inputs the information for the background check and drug screen.
5. The Director of Employment gathers all new hire paperwork into a packet and oversees its development into a personnel file.
6. The week before a new employee begins, the Director of Employment reviews the New Employee Onboarding Flow to ensure all onboarding tasks are being completed in a timely manner including HR, IT and Facilities tasks.
7. On the first day of employment, the Director of Employment will:
    a. Take the new employee to IT to have the new employee's picture taken for their ID badge, set up on laptop/computer and access email and other systems/software specific to the position .
    b. Oversee new employee onboarding documents provided via the employee information system.
    c. Provide a building tour.
    d. Assign the new hire training. The system will send an email to the new hire with the link to access the orientation videos.
    e. Email new hire instructions to access timekeeping system.
8. On the first day of employment, the Onboarding Flow provides notifications to specific departments of the new hire's start:
    a. Office of the Dean/President via Executive Assistant
    b. Institutional Effectiveness
    c. Faculty Affairs (if applicable)
    d. Web Developer for directory and webpage update
9. Human Resources will provide strategic check-ins to new employees.

Separation

1. Once an employee submits their letter of resignation, the Office of Human Resources will initiate the Offboarding Flow which creates notifications and assigns offboarding tasks to appropriate departments.
2. Prior to last day of employment, HR will:
    a. Review the Employee Exit Supervisor Checklist with Supervisor.
    b. Schedule exit interview with employee on last physical day.
    c. Cancel any benefits within the appropriate last date.
    d. Zero out deductions 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.
    e. Provide employee with the link to the Employee Exit Survey
3. On the last day of employment:
    a. HR conducts exit interview, provides employee with a separation packet and reviews specific information concerning benefits and 401(k):
        i.   Annual Leave remaining balance
        ii. Benefits end date
        iii. Final pay date

      iv.   401(k) distribution form and special tax notice (if not already emailed to separating employee).

      v.   Forwarding address (if different from what we have on file)

  b. HR Collects Institutional Items

      i.   Keys

      ii.   ID Card

      iii.   Business Cards

      iv.   Laptop

  c. Supervisors Collects Departmental Items (if applicable):

      i.   iPads

      ii.   Cameras

      iii.   Recording equipment

      iv.   Other departmental items purchased by department.

  d. Offboarding Flow will notify the following:

      i.   IT via a Help Desk ticket to inactivate employee in systems.

      ii.   Facilities to check and clean office/workspace.

      iii.   Office of the Dean/President via Executive Assistant

      iv.   Institutional Effectiveness

      v.   Web Developer to remove employee from directory and website.

      vi.   Security

4.   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

Employee Exit Checklist for Supervisors

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

7. Maintenance

Human Resources; to be reviewed every January.

8. Signature

Approved by	9/20/2023
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
9/8/2023	5	Procedural updates for both onboarding and offboarding processes		9/20/2023