

Employee Name _____

Department Name/Number _____

Supervisor _____

First Day of Employment _____

ON-BOARDING

STAGE ONE

- ☐ Complete hiring paperwork *(Completed by employee)*
- ☐ Read and review employee guidebooks, available on the LSC Website *(Completed by employee)*
- ☐ eID (eid.colostate.edu) after CSU ID is established *(Completed by employee)*
- ☐ Email address (after eID is established) *(Completed by IT)*
- ☐ Input employee information into Oracle *(Completed by Payroll/Personnel)*
- ☐ Link to time clock or create time sheet *(Completed by Payroll/Personnel)*
- ☐ Activate employee in leave system *(Completed by Payroll/Personnel)*
- ☐ Supervisor Payroll Report Setup (if new employee is supervisor of career staff) *(Completed by Payroll/Personnel)*
- ☐ RamCard ID *(Completed by RamCard Office)*
- ☐ Introduction to staff, Invite to Executive Director's Meeting for Introduction to Director's
- ☐ Location of key facilities; orientation tour
- ☐ Conflict of Interest Disclosure Statement (Admin Professionals will receive an email to complete this online)
- ☐ Keys / Access Card
- ☐ Uniforms
- ☐ LSC Shirt and CSU attire coupon with Executive Director's Office
- ☐ Parking information (See Guidebook)
- ☐ Notify Information Desk for mail sorting
- ☐ Website Photo with Marketing

STAGE TWO

- ☐ New employee orientation scheduled (University)
- ☐ Sexual Harassment Awareness Training (email from OEO)
- ☐ Office equipment training
- ☐ Other training or information (equipment)—specify:
- ☐ Voice mail or answering machine setup/instruction
- ☐ Name plate and/or name tag ordered

STAGE THREE

- ☐ Business card order
- ☐ Completion of Performance Evaluation Plan
- ☐ Telephone long distance access
- ☐ PCARD
- ☐ Initiate access to: Kuali, Oracle, Travel, eThority, etc.
- ☐ Notify Office Manager in Executive Director's Office to add employee to emergency contact list and birthday list
- ☐ Notify Executive Director's Office to update Org chart
- ☐ Specialized equipment assignment or checkout list

STAGE FOUR

- ☐ Purchasing policies & procedures (www.purchasing.colostate.edu)
- ☐ Authorized business function guidelines
- ☐ Add to appropriate listservs (Completed by IT)
- ☐ Special material handling training



OFF-BOARDING

EMPLOYEE

- ☐ Notify supervisor of resignation/retirement in writing, including last working date
- ☐ Furnish approved annual/sick leave information through last day of employment to payroll
- ☐ Purchasing / Credit Card – Turn in card, review all reports and gather receipts
- ☐ Travel Card – Turn in card and sign cancellation form
- ☐ Long Distance Calls – Review with supervisor and sign authorization
- ☐ Provide written resignation/retirement to Payroll Office

Failure to furnish required documents to Payroll/Personnel by the 10th of the month preceding departure date may result in a delay regarding receipt for non-standard payroll amounts

SUPERVISOR

- ☐ Notify the following of resignation/termination/retirement:
 - Executive Director
 - Director
 - Payroll/Personnel
 - IT Manager
 - Office Manager of the Executive Director's Office (to update org chart and emergency contact list)
- ☐ Inform employee about exit interview options with Executive Director, VP for Diversity
- ☐ Provide written resignation/retirement to Payroll/Personnel
- ☐ Verify and approve annual/sick leave record with employee and Payroll/Personnel
- ☐ Email Payroll Office the following information to request to process resignation/retirement:
last day employed, annual/sick leave taken through last day
- ☐ Review transition employee position duties (position duties, committees, etc.)
- ☐ Review computer records/files with employee
- ☐ Collect from employee, return to appropriate staff:
 - ☐ Keys: Return to Operations
 - ☐ PCARD: Return to Manager of Business Services
 - ☐ CSU Travel Card: Return to Manager of Business Services
 - ☐ Cell Phone: Return to Information Technology
- ☐ Notify IT and Operations of termination to remove card access
- ☐ Verify employee voicemail message after separation date
- ☐ If account Fiscal Officer, initiate change in Accounting System before departure

PAYROLL

- ☐ Obtain HR file from Office Manager of the Executive Director's Office
Process resignation/termination in HR system
- ☐ File written resignation/retirement/termination documentation in personnel file
- ☐ If employee is supervising employees, change supervisor in Oracle and set up monthly report
- ☐ Inactivate employee in leave system

IT

- ☐ Suspend access to: Outlook Calendar and email
- ☐ Suspend access to: Computer Access
- ☐ Suspend access to: Phone/Voicemail Access
- ☐ Remove from the Listservs

EXECUTIVE DIRECTOR

- ☐ Notify VPSA to begin replacement option

