Employee \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Section/Unit \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Manager\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Initial after each item is presented. Some items are provided in hard copy, most are located online. Online enrollment is preferred for insurance benefits and other optional program registration. You have permission to use your work computer to access orientation information and to complete necessary forms for the onboarding process. In the event you have difficulties accessing items on the computer, your Manager or the Personnel Office can provide you with printed copies. In addition to this document, you will be provided a Welcome Letter via email which explains how to access Workday and complete the onboarding process.

|  |  |  |
| --- | --- | --- |
| **ITEM** | **INITIALS** | **DOCUMENT DISTRIBUTION** |
| 1. Employee Emergency Contact Information |  | Complete in WORKDAY  https://wd5.myworkday.com/wday/authgwy/oregon/login.htmld? |
| 2. Position Description |  | Employee and Manager sign, submit to Personnel for Director signature; Once all signatures obtained – HR will upload to Workday |
| 3. I-9 Employment Eligibility Verification *\*\*Must be completed within 3 days from start date* |  | **Employee completes in Workday, followed by verifying documents w/HR. For remote areas, Manager communicates with HR to verify ID. (AGP Front Desk: 971-355-3983)** |
| 4. W-4 Withholding Allowance Certificate |  | **Complete in WORKDAY** |
| 5. PERS and OPSRP Designation of Beneficiary Form |  | Complete in PERS upon eligibility (Payroll)  https://www.oregon.gov/PERS/Pages/index.aspx |
| 6. EEO Self-Identification Form |  | Complete in WORKDAY |
| 7. Electronic Funds Transfer  Direct Deposit or Pay Card Form |  | Complete in WORKDAY |
| 8. Policies *(with signature sheet)* |  | Review, Initial, and Manager sends to Personnel (Link in Welcome Letter) |
| 9. PEBB Benefit Enrollment Insurance |  | Employee completes online at PEBB  (Link will come from Payroll) |
| 10. Employee Timekeeping |  | Complete in WORKDAY |
| 11. Paycheck Statement Information |  | Located in WORKDAY |
| 12. Sick Leave |  | Manager will discuss expectations with employee |
| 13. Vacation Leave |  | Manager will discuss expectations with employee |
| 14. Personal Business Leave |  | Manager will discuss expectations with employee |
| 15. Holidays and Special Day of Leave aka Governor’s Leave |  | Manager will discuss expectations with employee |
| 16. Employee Assistance Program |  | Manager will discuss program with employee (info in Welcome Letter) |
| 17. Wellness and Safety |  | Manager will discuss programs with employee |
| 18. Orientation to Section and Workspace |  | Manager or delegate will orientate new employee to workspace |
| 19. Agency and Unit Expectations |  | Manager will discuss with employee |
| 20. Collective Bargaining Agreements (CBA) AFSCME or IAFF *(if applicable);* Union Dues and Fair Share *(if applicable);* Meeting with Union Representative *(if required by the CBA for represented employees)* |  | Manager or delegate will discuss with employee the local Union point of contact |
| 21. Location of state Human Resource Management policies |  | Link will be sent in Welcome email from Human Resources on first day |

**Employee’s Signature \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

*(My signature indicates the above information was presented to me. I had the opportunity to review the information and have my questions answered. I understand items in the orientation may be subject to change depending on changes to policy, rules, laws, and Collective Bargaining Agreements.)*

**HR or Manager’s Signature \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

*(****Instructions for Supervisor:*** *Forward completed checklist to Personnel.* ***Instructions for HR:*** *The completed checklist gets loaded to the employee’s Workday Profile.)*

**Important Phone Numbers**

**Manager:**

**Payroll:** 971-355-4233 -or-

971-355-4430

**Fax:** 971-355-4244

**Personnel Office:** 503-584-3588

**Fax:** 503-584-3556