Employee Onboarding

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Onboarding Process

- Pre-boarding
  - Offer Letter Process
  - Background Checks
  - Other Pre-start Date Preparation
- Orientation
  - Introduction to district, colleagues and their role
  - Required Forms
  - Optional Forms
  - Benefit Administration
- Job Training
- Mentoring Program
- Additional Employee Follow-up

Timeline

Source: https://www.smartsheet.com/complete-guide-employee-onboarding-hr-experts
New Hire Form

Things to include on your form:

- Demographic Information
- Job posting information
- Current licensure status
- Preferred and actual start date
- Benefits eligibility status
- Employee schedule
- Salary placement (e.g. BA & 2)
- Actual salary or hourly wage
- EDRS Coding
- District/building placement
- Room/desk location
- Technology/security needs
- Turnover information
- Mentor assignment

Route forms to all affected parties.

Offer Letter

- Should include the following information:
  - Assignment information including:
    - Job Title
    - # of contract days or % of full-time equivalent (FTE)
    - Pay grade information (e.g. grade or Lane/Step)
    - Salary or hourly pay rate
  - Offer conditions, such as, but not limited to:
    - Receipt of a satisfactory background check (and other required checks)
    - Receipt of official transcripts
    - Obtainment of proper licensure for position
    - Information about board approval of hire
    - Background check instructions
    - Summary of benefits
    - Orientation information
Offer Letter Template

[Enter Date of Letter]

[Enter Name]

[Enter Street Address]

[Enter City, State, Zip]

Dear [Enter First Name],

On behalf of SWWC Service Cooperative, it is my pleasure to confirm your acceptance of our offer of employment as follows:

[Choose Assignment]

[Click here to enter assignment]

[Choose Days or FTE]

[Click here to enter # of days or FTE]

[Choose a schedule type]

[Click here to enter Pay Grade or Level/Lane/Schedule & Step]

[Choose payment type]

[Click here to enter salary or hourly rate]

This offer of employment is conditional pending [Choose list of items or create your own]. Once [Choose an item] has been received, we will obtain official approval by the SWWC Service Cooperative’s Board of Directors. [Choose an item]

Pursuant to Minnesota Statute 123B.03, we are required to conduct a criminal background check from the Bureau of Criminal Apprehension (BCA) on individuals who are offered employment. Please complete the enclosed background check form and return it to me within 10 days, along with a money order or check payable to the SWWC Service Cooperative for $15.00 for the cost of the BCA background check. It is our policy that if you fail to return it, you will be considered to have voluntarily withdrawn your application for employment.

This [Choose a list of enclosed items], along with the SWWC Employee Manual, Board Policies, and [Choose a group policy], sets forth the terms of your employment with SWWC and supersedes any prior representations or agreements whether written or oral. These documents will be reviewed with you at New Employee Orientation, which is scheduled for [Click here to enter orientation information].

If you have any questions, please call me at (507) 537‐2242 or email me at elizabeth.sullivan@swsc.org. [Enter First Name], welcome to SWWC!

Sincerely,

[Enter First Name], [Title]

[Enclosures]

[cc: Click here to enter Supervisor’s name to cc]

[Personnel File]

[Background Checks]

- Background checks should be completed AFTER the offer of employment, but PRIOR to the start of an employee’s work with students.
- Check must be compliant with MN Statute 123B.03.
- There are a wide variety of vendors out there, so do your due diligence when selecting a vendor.
  - The MN Bureau of Criminal Apprehension (BCA) will not approve many of the vendors, but the MN BCA check must be done as part of your background check process.
- You must get the employee’s signed authorization to perform the criminal background check with your vendor.

[Type III Bus Driver]

- Type III Bus Driver
  - Type III vehicles are restricted to passenger cars, station wagons, vans, and buses having a maximum manufacturer’s rated seating capacity of 10 or fewer people including the driver and a gross vehicle weight rating of 10,000 pounds or less. A van or bus converted to a seating capacity of 10 or fewer and placed in service on or after August 1, 1999, must have been originally manufactured to comply with the passenger safety standards.
  - Must complete the following:
    - Annual training and certification
    - Criminal background check
    - Physical
    - Pre-employment drug testing
    - Verification of driver’s license
    - Background check with MN Department of Public Safety for violation status per MN Statute 171.02 Sub. 2b
    - Vehicle inspection
Teacher Disciplinary Inquiry System

- Teacher Disciplinary Inquiry System (TDIS)
  - A 2008 state law requires a school board or other school hiring authority to contact the Board of Teaching before hiring a new teacher to determine if disciplinary action has ever been taken against the individual. The Teacher Discipline Inquiry System (TDIS) is a password-protected online search application created for this purpose. School boards or other appointing authorities should designate an individual to access TDIS.
  - New users will need to set up an account before using the system. Requests will be approved by the Board of Teaching. Users must search for records by teacher file folder number. A License Lookup feature is available if the file folder number is not known.
  - Disciplinary action taken against a licensee will be available on this system. This action represents the final action taken by the Board. Only public information will be presented; the Board is unable to provide additional information due to data privacy laws.
  - You should maintain a file of proof that you’ve verified this for all new hires. A PDF print-out or screenshot suffices.

Third Party Billing

- All Minnesota Health Care Programs (MHCP) providers, including all charter schools, education districts, intermediate districts, tribal schools, service cooperatives, special education cooperatives, and state academies, are required to conduct screening checks for employees or contractors to determine if they are identified on the MHCP and the U.S. Office of Inspector General (OIG) Excluded Providers List. In addition, schools, districts, cooperatives, and academies must also perform a background study for each employee or contractor who will provide services that will be billed to MHCP.
  - MHCP cannot enroll or pay providers that are excluded from participation in Medicare, Medicaid, or other federal health care programs. Providers cannot use MHCP funds to pay excluded individuals or entities that they employ or contract with.
  - What do I need to do?
    - Do not use MHCP funds to pay excluded individuals you employ or entities you contract with.
    - In addition to the criminal background check, any employee that is billed to MHCP must be checked prior to hire AND monthly thereafter to verify they are not on the following exclusion lists:
      - MHCP Excluded Provider List
      - Search both the OIG National Exclusion list and the Minnesota MHCP list
      - List of Excluded Individuals and Entities (LEIE) Database

Other Pre-boarding Preparation

- Send a welcome letter and orientation invitation.
  - Make sure they know where to park, what room to report to and other important details for their first day.
  - Include their first week’s agenda so they know what to expect.
  - Remind them to bring proper documentation for their I-9.
- Assign a mentor and have them send a welcome letter, too.
- If you want them to fill out paperwork in advance, send electronically or by mail.
- Order any keys, computer, nameplate, business cards, etc. so that they are ready to go on Day 1.
- Set up their workstation, including phone and internet connections. Make sure their email is set up.
Other Pre-boarding Preparation

- Send benefit information in advance when possible.
  - Welcome to our team! We are looking forward to meeting you at your new employee orientation.

  Prior to orientation, you can learn about SWWC’s insurance and benefit offerings by viewing the Insurance 101 webinar available at http://www.swsc.org/insurance101.

  After you’ve received your login credentials for your SWWC email account, you will be able to access the email sent to you from our online enrollment website, EaseCentral, so that you can complete your enrollment process.

  Insurance coverage begins on the 1st day of the month following your hire date, so your coverage will begin on ____________.

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Orientation – Required Forms

- **I-9**
  - Check out I-9 Central & the Form I-9 On-Demand webinar for additional help.
  - Always use the most recent version of the I-9. Current form expires 8/31/19.
  - You must give the employee the full I-9, including all pages of instructions.
    - HINT: You may have one handout of instructions to share with employee at the time of completion. If they do not want to keep it, then you can reuse instruction packet.
  - Make sure the employee completes their section (Section 1) no later than the first day of employment, but never before the employee has accepted the job offer.
  - You must complete the employer section (Section 2) within 3 business days of the employee’s first day of employment.
  - Do not forget to fill out the employee’s name at the top of Section 2.
    - HINT: If you do the form digitally with the employee, it will auto-populate many of the fields and eliminate errors.
  - Make sure any forms of identification used for the I-9 are unexpired, valid documents.
  - You cannot dictate which documents an employee can use for the I-9.
  - If you make copies, make sure you do it for every hire and attach them to the I-9 form.

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Orientation – Required Forms

- **W-4**
  - Employees often ask what they should claim, but do not give out tax advice unless you are a certified tax professional. At the most, say the lower the number of allowances, the more taxes are taken out. If they need further advice, they should consult a professional.
  - The Personal Allowances Worksheet often ends up resulting in a higher number of allowances than what an employee probably should claim for their taxes. Again, while this is not your responsibility to look after, I would advise them to consult a tax professional if it seems to be too high, or you will have an unhappy employee when taxes are filed.
  - **MN W-4**
    - Generally, an employee claims the same for federal and state taxes. However, if they do not wish to or if they have any of the following circumstances, they must also complete a MN W-4.
      - Claim fewer Minnesota withholding allowances than your federal allowances;
      - Claim more than 10 Minnesota withholding allowances;
      - Want additional Minnesota withholding deducted from your pay each pay period; or
      - Claim to be exempt from federal withholding or claim to be exempt from Minnesota withholding.

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Orientation – Optional Forms

- Direct Deposit Authorization – this is required for our agency, but each district can make that determination.
  - MN Statute 177.23 allows requirement of electronic fund transfer for payroll.

- Emergency Contact Form

- Welcome Form – we use this form to share family information, hobbies/interests, job history and educational background about new hires with our staff on our employee portal and with newspapers and social media, if authorization is given.

- Vaccine Declination/Consent Form – we offer the Hepatitis B vaccine to all of our employees and use this form to track that they were given the option.

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Orientation – Information Shared

- We give a logoed flash drive to all new hires with the following content:
  - 101 Handouts (Benefits, Insurance and Paystub)
  - Agency Publications (What is SWWC, Annual Report, Branding and Social Media)
  - Bloodborne Pathogen Information
  - Essential Board Policies
  - EAP Information
  - Employee Manual
  - How To
    - AppliTrack Login
    - E-mail login, creating signature, and adding picture to profile
    - Expense Reimbursement
    - Google Apps
    - Honeywell Instant Alert System
    - How to Register for myBlueCross
    - TimeClock Plus (as well as leave code details)
    - TimeClock Plus (as well as leave code details)
  - Personnel Policy or Master Agreement
  - Summary of Benefits

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Orientation – Essential Board Policies

- MSBA Policy #402 – Disability Non-Discrimination
- MSBA Policy #406 – Public and Private Personnel Data
- MSBA Policy #407 – Employee Right to Know – Exposure to Hazardous Substances
- MSBA Policy #410 – Family and Medical Leave Policy
- MSBA Policy #413 – Harassment and Violence
- MSBA Policy #414 – Mandated Reporting of Child Neglect or Physical or Sexual Abuse
- MSBA Policy #415 – Mandated Reporting of Maltreatment of Vulnerable Adults
- MSBA Policy #418 – Drug-Free Workplace
- MSBA Policy #419 – Smoke/Tobacco Free Environment
- MSBA Policy #420 – Students and Employees with Sexually Transmitted Infections and Diseases and Certain Other Communicable Diseases and Infectious Conditions
- MSBA Policy #423 – Employee-Student Relationships
- MSBA Policy #451 – Bullying Prohibition Policy
- MSBA Policy #451 – Protection and Privacy of Pupil Records
- MSBA Policy #452 – Internet Acceptable Use and Safety Policy
Annual Sign-Off Example

Orientation – Information Shared

- Explain your building safety/security and crisis plans.
- Review your employee manual.
- Review any Personnel Policies and/or Master Agreements.
- Explain any Bloodborne Pathogens training, Harassment training and/or other trainings your district requires.
- Explain any required systems such as:
  - Web-based timesheet and/or leave request entry
  - Employee self-service website (SMART eR)
  - Employee portal of district website
  - District email

Orientation – TRA/PERA

- Those who are required to have a license for their position (MDE licenses, OT, PT, Mental Health Professionals), will be enrolled in the Teachers Retirement Association (TRA), which is currently 7.5% employee and 7.71% employer contributions (7.92% for 2019-20).
- Those who do not qualify for TRA (COTAs, clerical staff, technology staff) will be enrolled in the Public Employees Retirement Association (PERA), which is currently 6.50% employee and 7.50% employer contributions.
- The employee should receive information from TRA or PERA in the mail, but the handbooks are also available on the Employee Portal.

- Those who are enrolled in PERA have the option of enrolling in an additional life insurance plan.
- The premium is $16/month deducted from payroll post-tax.
- See PERA NCPERS brochure for further information.
Orientation – Benefit Administration

Total Compensation Package Offer and Summary of Benefits Examples

- If you use an online benefit enrollment website, make sure employees are emailed the login information.
- Review all offerings – health, dental, vision, life, LTD, supplemental, etc.
- Make sure all benefit explanations include the following:
  - Plan overview – what the plan covers, including preventive care items
  - Deductible
  - Cost to the employee
  - Annual acknowledgments including, but not limited to:
    - Summary of Benefits and Coverage (SBCs)
    - Notice of Special Enrollment
    - Exchange Notices
      - MinnCare (MN residents) – these are now the same as the COI notices
      - DMH and other state insurance
    - Children’s Health Insurance Program Notice
    - Insurance Plan Consideration Notice
    - Any Insurance Provider Member Communication
  - Unique benefits such as embedded deductible or 4th quarter carryover

Orientation – Benefit Administration

Insurance Cost per Paycheck Example

<table>
<thead>
<tr>
<th>Year</th>
<th>Monthly Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018-19</td>
<td></td>
</tr>
</tbody>
</table>
Orientation – Benefit Administration

- Review any additional benefit information, such as:
  - Claim form process
  - Any automatic reimbursement features
  - Debit card options
  - Additional required paperwork, if not part of regular enrollment process (e.g. VEBA Add Dependent Form and HSA Application)
  - Account options, such as:
    - Flexible spending accounts (medical and dependent care)
    - VEBA
    - HSA
    - HRA
  - Online account management

Orientation – Benefit Administration

- If you offer a 403(b) plan, also known as Tax Sheltered Annuities or Deferred Compensation, you are required to provide meaningful notice to all employees annually of this benefit.
- Make sure new hires are aware of the following:
  - Eligibility requirements
  - Contribution options if you offer both Roth and Traditional
  - Annual contribution limits
  - Enrollment process, including:
    - Required forms
    - Timelines
  - Authorized Investment Providers
  - Distribution, Loan, Transfer, Rollover, Exchange and Hardship Withdrawal information
- Don’t forget to share other benefits such as EAP, cell phone discount, Dell employee discount, health-related benefits, etc.

Orientation – Employee Portal

- While not a requirement, it is a great employee resource to have an employee portal for any of the following items, though the possibilities could include much more:
  - Announcements
  - Benefit Information
  - Calendars
  - Committee Information
  - Communications (e.g. templates)
  - Directories
  - Discount Program Information
  - Employee Evaluation Process
  - Forms
  - Induction Program Information
  - Insurance Information
  - Newsletter Archive
  - Payroll Information
  - Policies & Manuals
  - Professional Development
  - Resources (e.g. How To documents)
  - Technology Resources
  - Wellness
  - SWWC Employee Portal
Job Training

- Even though the employee may have had previous education or experience in the job they’ve been hired for, a district employee should provide job training, including, but not limited to:
  - District facilities tour and team introductions
  - How/where to access resources
  - Lesson planning and curriculum requirements
  - Classroom management
  - Attendance and grading procedures
  - Student records and related organizational skills
  - How to handle parents and media
  - Emergency preparedness
  - Other specific job duties
  - Resiliency training
- Have a conversation with your district administrators to make sure they are aware what you expect of them and that you know what they expect of you when it comes to the onboarding process.

Employee Mentoring

- Onboarding does not stop with pre-boarding, orientation and training.
- At SWWC, each new employee is assigned a mentor who has completed a mentor training.
- This mentor will provide:
  - monthly meetings with the new hire,
  - observations and coaching, - AND -
  - ongoing consultation.
- Some examples of things the mentor may assist with include, but are not limited to:
  - learning how to complete forms such as workshop requests, clock hour approval forms, course credit approvals for lane changes, special education requisitions, etc.,
  - office procedures such as how to make copies, check out a car, etc.,
  - introduce the employee to other colleagues, - AND -
  - provide an opportunity to ask questions without feeling intimidated.

Source: https://www.smartsheet.com/complete-guide-employee-onboarding-hr-experts
Follow-up

- After your new hire completes benchmark dates (e.g. 1 week, 1 month, 3 months, 6 months, etc.), be sure to follow up with them to find out:
  - How are things going, in general?
  - Do they have questions on district policies or procedures?
  - Do they understand the district’s mission, vision and values?
  - Do they know where to receive help and support, if needed?
  - Do they have any pay, benefit and/or insurance questions?
  - Have they been provided the tools to do their job effectively?
  - Is there additional training they would find helpful?
  - How has the job met (or not met) their expectations?
  - Have their colleagues been helpful?
  - Are they receiving useful feedback from their supervisor?
  - What else do they need to be successful at ABC District?

Questions?