

Onboarding Checklist – Ambassador

The role of Ambassador in the OBH Onboarding Program is to partner with a new employee during his/her first two months of employment. While primarily responsible for offering advice and guidance regarding the day-to-day aspects of working at OBH, the ambassador may also offer encouragement, knowledge, and resources as they help introduce the new employee to the OBH culture.

Items on the checklist that are followed by brackets [] indicate that a resource is available in the Onboarding Program folders on the OBH Z: Drive. The name in brackets refers to the folder where the resource is located. Onboarding Program folders are located here:
Z:\Data\OBH\OBH Operations\Onboarding.

New Employee Name: _____

Start Date: _____

Day One:

- Discuss the role of the Ambassador
- First day lunch

Day Two:

- Provide a copy of this checklist to the employee
- Tour of the facility
- 4th Floor Plan [Useful Information]
- Location of printers, copiers, fax machines, and scanner
- Confidential printing and copier codes [Useful Information]
- [New Employee Checklist](#) [Process Documents\Checklists]
- Location of OBH network drive (Z: drive) and Onboarding folders
- Introduce Onboarding Coordinator, administrative assistant, and HR liaison
- Introduction to Training Coordinator to schedule meeting
- Introduction to Safety and Emergency Preparedness Coordinator to schedule meeting
- Introduction to Logistics Coordinator to schedule meeting

Week One:

- LEO Login and Password Quick Reference [LEO Quick References]

Onboarding Checklist – Ambassador

- LEO Address Bank Tax Quick Reference [LEO Quick References]
- LEO Pay Statement Quick Reference [LEO Quick References]
- Commonly Used Acronyms [Useful Information]
- Policies and Procedures Directory [Z:\Data\OBH\OBH Operations\Policies and Procedures])
- Useful Websites and Links [Useful Information]

Weeks Two-Four:

- LGE Map and Contact Information [Agency Information]
- OBH Headquarters Functions [Agency Information]
- OBH Business Plan [Agency Information]
- DHH Business Plan [Agency Information]
- OBH Services Overview [Agency Information]
- State Facilities Manual [Policies and Procedures]

Comments:

Ambassador: _____

Date: _____

OBH Employee: _____

Date: _____

Please scan the completed checklist and email to the Onboarding Program Coordinator.

Onboarding Checklist – Human Resources Liaison

The role of the LDH Human Resources Liaison in the OBH Onboarding Program is to provide an essential link between the department’s human resources and hiring functions and the OBH Onboarding Program. The LDH Human Resources liaison provides guidance and technical assistance to help new hires navigate the human resources processes.

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New Employee Name: _____ Start Date: _____

Pre-Employment:

- Notify Onboarding Coordinator that interviews are commencing
- Notification to proceed with hiring sent to hiring supervisor
- Notify Onboarding Coordinator of start date

Day One:

- Schedule appointment for technical assistance or referrals as necessary regarding DHH HR paperwork

Week One:

- Continue to provide technical assistance or referrals as necessary

Comments:

Human Resources Liaison: _____ Date: _____

OBH Employee: _____ Date: _____

Please scan the completed checklist and email to the Onboarding Program Coordinator.

Onboarding Checklist – Logistics Coordinator

The role of the Logistics Coordinator in the OBH Onboarding Program is to ensure that all new employees have the necessary resources and equipment to begin work right away, and to provide guidance regarding the operational aspects of working at OBH.

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New Employee Name: _____ Start Date: _____

Pre-Employment (when interviews commence):

- Obtain Fiscal Operations Request for Dial Tone or Equipment form from Supervisor with assigned cubicle/office
- Clean and prepare cubicle or office
- Provide basic office supplies
- Request telephone line and provide telephone number, temporary password, and voicemail instructions on desk [Useful Information]
- Leave OSB Facilities Manual on desk [Useful Information]
- Leave Fiscal Operations contact card on keyboard
- Set up computer and printer (if available)
- Ensure office furniture keys are available

Pre-Employment (when name is confirmed):

- Update Fiscal Operations Request for Dial Tone or Equipment form with employee's name
- Complete and affix cubicle name sign [Forms]
- Request computer-related access from IT
 - Email
 - Lync
 - Z: drive (request addition to OBH-HQ security group)
 - ISIS/LaGov if requested by supervisor
 - Other software as requested by supervisor

Onboarding Checklist – Logistics Coordinator

- Provide supervisor with email address, username and temporary password for computer
- Request Sharepoint and secure email access from HPM designee
- Update OBH telephone directory and send link via email to office staff
- OBH telephone directory on desk [Useful Information]

Weeks One-Two:

- Complete Fiscal Operations Equipment Assignment form
- Update Fiscal Operations Property Master spreadsheet
- Provide a copy of this checklist to the employee
- Map to public printers as necessary
- How to add a state email account to a smartphone [Useful Information]
- How to connect to LDH WIFI (Cooper) – iPhone, Android, and Computer [Useful Information]
- Provide location of logistics policies and procedures [Policies and Procedures]
- Scheduling Meetings in Outlook and how to use Room Finder [Useful Information]

Policies and Procedures:

- OBH 400.1 Purchasing Procedure [Policies and Procedures]
- OBH 400.2 Fleet Vehicles and Driver Safety Procedure [Policies and Procedures]
- OBH 400.3 Office and Printer Supplies Procedure [Policies and Procedures]
- OBH 400.4 CBA Travel Procedure [Policies and Procedures]
- OBH 400.5 Teleconference Services Procedure [Policies and Procedures]
- LDH Internet Policy [Policies and Procedures]
- OBH Electronic Mail Procedure [Policies and Procedures]

Onboarding Checklist – Logistics Coordinator

Forms:

- Fiscal Operations Request Forms [Forms]
- Travel Expense Form [Forms]
- Travel Authorization Form [Forms]
- Expenditure Exemption Form [Forms]

Comments:

Logistics Coordinator: _____

Date: _____

OBH Employee: _____

Date: _____

Please scan the completed checklist and email to the Onboarding Program Coordinator.

Onboarding Checklist – New Employee

Welcome to OBH! The first couple of days and weeks can be an intimidating and challenging experience with so many forms to complete, people to see, and training to complete. This checklist is designed as a reference guide to help you keep track of tasks, resources, and information that will help you gain knowledge and build relationships with the goal of quickly and successfully integrating into the organization. If, after your first month, you are unable to check off any of these items or have any questions, please discuss with your supervisor.

After your first month at OBH, you should know...

About Your Job

- How OBH is organized
- OBH's goals and mission
- Specific functions of your section/unit
- To whom you report
- Your duties and responsibilities
- Your scheduled work hours and days
- Your scheduled lunch breaks and breaks and if they are flexible
- The performance expectations for your position
- The length of your probation period (if classified)
- How performance planning and evaluation is managed, by whom, and how often
- Your supervisor's expectations regarding attendance and tardiness
- The procedure for requesting time off and reporting absences
- When staff meetings are held
- How you will be trained and by whom
- Career development opportunities available
- What training you are expected to complete
- The safety requirements of the job
- Your role in emergency preparedness and response
- How to access information on LDH and OBH policies and procedures
- The benefits, services and resources available to you and your family
- The appropriate use of confidential information

Onboarding Checklist – New Employee

About Your Work Environment

- Your colleagues and their job functions
- How to sign into LEO
- How to access training information on LEO
- Your assigned work area and the office furniture and supplies you will be issued
- How to initiate a Help Desk request
- How to use the phone systems and e-mail
- How to schedule a meeting in Outlook
- How to use and locations of printers, copiers, scanners, fax machines
- Procedure for making long-distance phone calls
- How to access the LDH intranet
- The location of restrooms, fire exits, and break rooms
- How to obtain/order office supplies or other tools or resources
- The procedures for work-related travel
- The rules for after-hours access to your work area
- The location of policies and procedures on the Z: drive

About Your Pay

- Your rate of pay
- How overtime is managed
- The time recording procedure for your area
- State holidays and pay periods
- How to obtain pay statements
- Travel and reimbursement procedures
- Annual and sick leave accrual rates
- Leave and attendance policies
- How to update your bank information

Onboarding Checklist – Onboarding Coordinator

The role of the Onboarding Coordinator in the OBH Onboarding Program is to facilitate the design and delivery of the Onboarding Program, assist all Onboarding Coordinators in their roles, provide technical assistance, and troubleshoot problems.

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New Employee Name: _____ Start Date: _____

Pre-Employment:

- Email supervisor (copy Fiscal Operations) requesting completion of Fiscal Ops request form.
- After notification from HR Liaison that hiring may proceed, obtain name, title, and names of administrative assistant and ambassador from supervisor.
- Send Initial Onboarding Email to all recipients [Process Documents\Email Templates]
- Meet with supervisor, coordinators, and ambassador to ensure understanding of processes and answer questions
- Assist in the resolution of any problems
- Verify that pre-employment portion of onboarding checklists are complete

Week One:

- Week one check-in with supervisor, coordinators, ambassador, and new employee
- Provide assistance as necessary

Week Two:

- Week two check-in with supervisor, coordinators, ambassador, and new employee
- Provide assistance as necessary

Weeks Two-Four:

- Weekly check-ins as necessary

Onboarding Checklist – Onboarding Coordinator

- Email Onboarding Program evaluation to supervisor, coordinators, and ambassador [Process Documents\Email Templates]

Month Two:

- Email Two Month Onboarding Program evaluation to employee [Process Documents\Email Templates]
- Compile evaluation results and provide to supervisor, coordinators, ambassador, and EMT

Continuous:

- Note process improvements and strengths
- Update information and resources as new sources or versions become available
- Update program policies and procedures

Comments:

Onboarding Checklist – Safety Coordinator

The role of the Safety Coordinator in the OBH Onboarding Program is to ensure that all new employees understand their role in department emergency preparedness and response, and have the resources necessary for maintaining a safe and productive workplace.

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New Employee Name: _____ Start Date: _____

Week One:

- Provide a copy of this checklist to the employee
- Obtain Employee Emergency Database (EED) information from time keeper

Week Two:

- Discuss the role of the Safety Coordinator
- Safety Orientation Checklist [Emergency Preparedness and Safety]
- OBH Emergency Preparedness Training Requirements (Onboarding Emergency Preparedness and Safety)
- LDH Mandatory Training Requirements for Emergency Preparedness - NIMS and ESF-8 [Emergency Preparedness and Safety]
- Safety training presentation and acknowledgement [Emergency Preparedness and Safety]
- Fire alarm procedures and introduction to floor warden
- Location of first aid stations

Policies and Procedures (Located in Onboarding Emergency Preparedness and Safety):

- OBH Annual Safety Statement
- OBH Emergency Preparedness Policy
- OBH Disaster Preparedness and Response Overview
- OBH Safety Policy

Onboarding Checklist – Safety Coordinator

- Bienville Security Procedures
- LDH General Safety/Loss Prevention Manual and Safety Rules
- LDH Emergency Preparedness Policy

Comments:

Safety Coordinator: _____

Date: _____

OBH Employee: _____

Date: _____

Please scan the completed checklist and email to the Onboarding Program Coordinator.

Onboarding Checklist - Supervisor

The role of the Supervisor in the OBH Onboarding Program, in addition to traditional supervisory responsibilities, is to help the new employee acclimate to the culture and values of the agency, clearly explain expectations to ensure a smooth transition, and ultimately offer resources for the new employee to succeed in their new position.

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New Employee Name: _____ Start Date: _____

Pre-Employment:

- Complete Fiscal Operations Request for Dial Tone or Equipment form and provide to Logistics Coordinator [Forms]. Please use the desired name of the new employee.
- Notify timekeeper of new employee
- Encourage employee to complete and submit LDH HR paperwork prior to first day
- Notify Fiscal Operations if an office key is required

Day One:

- Send new employee introduction email in the morning [Process Documents\Email Templates]
- Meet employee in LDH lobby
- Check on LDH HR paperwork completion
- Review SF-3 and job functions
- Request extended building access from LDH Safety Coordinator in room 138 [Forms; Policies and Procedures]
- Escort employee to LDH HR (8th floor) for parking ticket validation and employee identification badge
- Introduce employee to Assistant Secretary, Deputy, Ambassador, timekeeper, HR Liaison, and other key personnel

Onboarding Checklist - Supervisor

- First day lunch
- Provide a copy of this checklist to the employee

Day One – Time and Attendance:

- Discuss time and attendance expectations
- For CATS users only* – notify OBH budget section of new employee
- Complete Work Schedule Change Form if applicable [Forms]
- OBH 800.5 Timekeeping and Attendance Procedure [Policies and Procedures]
- Overtime Authority and LDH Overtime Request Form [Forms]
- State Uniform Payroll Calendar [Useful Information]
- Current Year Pay Periods [Useful Information]
- LDH Conversion Chart of Minutes to Hours [Useful Information]
- LEO Detailed Time Statement – Printing Guide [LEO Quick References]

Week One – General:

- Introduce employee to OBH staff
- Timekeeper inputs employee information into Employee Emergency Database (EED) and notifies Safety and Emergency Preparedness Coordinator
- Submit VPN Request Form to IT if applicable [Forms]
- Order business cards, if appropriate [Onboarding Forms]
- Week one check-in meeting
 - Is employee comfortable?
 - Are employee needs being met (supplies, knowledge, etc.)?
 - Is employee meeting initial expectations (attendance, punctuality, etc.)?
 - Does the employee have questions about the job or organization?
 - Does the employee have questions regarding training plans?

Onboarding Checklist - Supervisor

Week Two:

- Week two check-in meeting

First 30 Days:

- Introduce employee to the NVRA Site Coordinator, and assign NVRA training in LEO if applicable [Policies and Procedures]

First 90 Days:

- PES Planning Session complete [Policies and Procedures]
 - Work and Behavior tasks clear and understood?
 - Training requirements clear?
 - Due dates clearly communicated?
 - Employee development planned?
 - Forms signed and copies given to appropriate personnel (employee, HR)?

Continuous:

- Weekly check-in meetings

Comments:

Supervisor: _____

Date: _____

OBH Employee: _____

Date: _____

Please scan the completed checklist and email to the Onboarding Program Coordinator.

Onboarding Checklist – Training Coordinator

The role of the Training Coordinator in the OBH Onboarding Program is to assist all new employees with their understanding of the mandatory agency training requirements, how to access training, and where to obtain help.

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New Employee Name: _____ Start Date: _____

Pre-Employment:

- Pull ZMDSHEET and Training Transcript (if previous state employee)
- Prepare customized training plan
- Subscribe employee to applicable CPTP training program

Week One:

- Provide a copy of this checklist to the employee
- Discuss the role of the Training Coordinator
- Discuss customized training plan
- Administrative Staff Only – Assign LEO Time Administration Courses (must be completed prior to assuming time administrator duties)
 - LaGOV HCM Basic Navigation (prerequisite course) – WBT
 - LaGOV HCM Basics of Time Administration – WBT
- Mandatory LDH training requirements [Training]
- Driver Authorization Form [Forms]
- ORM Defensive Driving course in LEO
- Travel Work Center Training in LEO for travel reimbursement
- Cubicle Etiquette web-based training course in LEO
- Cubicle Etiquette [Training]
- State Civil Service CPTP videos (<https://www.youtube.com/user/LAStateCivilService>)
 - Prohibited Political Activities
 - LEO Booking a Web-based Course

Onboarding Checklist – Training Coordinator

– LEO Who do I contact for Help?

LEO My Training Quick Reference [LEO Quick References]

Follow-Up:

Prepare and send notice of training orientation to supervisor

Comments:

Training Coordinator: _____

Date: _____

OBH Employee: _____

Date: _____

Please scan the completed checklist and email to the Onboarding Program Coordinator.