Peralta Community College District

ONBOARDING PROCEDURAL MANUAL

(Manager Edition)

2022

Berkeley City College   College of Alameda   Laney College   Merritt College   District Office

Contents

MESSAGE FOR MANAGERS/SUPERVISORS

Congratulations on your new employee!

This guide provides an overview of onboarding. It contains information, resources, and tools which can be used as a starting point for successfully welcoming new employees onto your team and to PCCD.

The district strives to create a positive working experience where all employees are informed and engaged and have strong working relationships with their manager/supervisor and colleagues across PCCD.

WHAT IS ONBOARDING?

Onboarding is more than completing new hire paperwork or attending an orientation. Onboarding is a collaborative, strategic approach that provides new employees with the needed information, tools and resources to effectively meet organizational goals.

Onboarding aims to:

- Increase new employee productivity by training them about the District, Department and Division and their respective cultures.

- Improve retention rates of new employees within all employee groups by providing the wide array of information that employees need to feel engaged, successful, and connected.

- Provide audience-specific, in-depth, timely information over an extended period of time, so that information is useful and memorable for the new employee.

- Streamline processes and provide best practice information to enable managers/supervisors to deliver high-quality, consistent, and accurate information systematically to all new employees.

- Foster an environment of employee engagement, where employees feel that the Peralta District is a great place to work.

ONBOARDING RESPONSIBILITIES

Once you've completed the recruiting process and a candidate is selected to be hired now what? The next step is Onboarding. A detailed Manager Checklist is available for onboarding new hires but here's an overview of the process:

Managers/Supervisors

After working with the Recruiter on information like start date, pay rate, offer letter, etc., create an eFORM.

•Managers/Supervisors/ Classified/Hourly and Rehires:

==eFORMs need to be in HR's queue up to 15 days after an offer is made;== **consequences can result in delay in email/programs, access, and pay and incur late pay penalty fees**

==Note: New hires cannot start until paperwork is completed and entered by HR==

IT IS IMPORTANT FOR THESE TIMEFRAMES TO BE MET IN ORDER TO AVOID DELAYS

For example:

Offer Made
Date: 2/1/2022 (Day 1)
The manager/campus makes an offer to applicant.

New Hire ePAF + Campus ePAF approvals
Date: 2/1/2022 - 2/7/2022 (Day 1-7)
Campus generates new hire ePAF.
All campus approvers are responsible to approve ePAFs in a timely manner by Day 7, the latest.

District ePAF Approvals
Date: 2/8/2022 - 2/14/2022 (Day 8-14)
All district approvers are responsible to approve ePAFs in a timely manner by Day 14, the latest.

Human Resources (HR)
Date: 2/15/2022 (Day 15)
new hire ePAF should be in Human Resources' queue for processing. HR onboarding process begins.

The eFORM User Guide can be found here: https://peralta.instructure.com/courses/56014

Managers are not only responsible for initiating the eFORM, but ensuring it goes through the approval process. HR cannot provide any action until the eFORM is in their queue.

Faculty Hires

For Faculty Hires the eFORM comment section must include:

- The discipline the new hire will teach. MQs verified. Application #CN000****"
- If counseling, then specify DSPS/EOPS or COUN

- If hired through FDIP, please specify in the comment section and submit the mentor/mentee contract
- If employee is going through equivalency, then specify in the comment section and verify that the paperwork was submitted

NOTE: eFORM will be returned and process will be delayed for the following conditions:

- Transcript in application does not include the conferred date and conferred degree
- Applicant does not meet minimum qualifications and equivalency process has not been initiated

Please Note: **Faculty new hire eFORMs and rehire eFORMs must be in the HR queue up to 15 days after an offer of assignment is made or else faculty new hire will see a delay in their access and pay. Please note new hires cannot start working until all paperwork is completed and entered in by HR.**

Hourly Hires

For temporary and hourly employees, managers need to submit the following information:

- Acknowledgement form: Either the SEIU 1021 or Local 39 depending on the position, will help you to choose the correct hire and understand the rules for each type of hire. (Remember most of these hires require Board approval).
- Once completed forward the form to the Generalist that handles your hires.
- Calendar that shows the employee's working days.

All New Hires

The eFORM will go through the appropriate approval chain and then reach HR.

Human Resources

Once HR receives the eFORM, HR will email the new hire requesting the following:

- New hire packet
- Live Scan Request (Background Check)
- Tuberculosis Test (TB Test) Results
- Vaccination Proof or Exemption Request

Once the new hire has completed HR's paperwork and requests, HR will contact the hiring manager to let them know the new hire is cleared to start.

HR will enter the new hire in HCM, Benefits Bridge (if eligible for benefits), retirement (if eligible) and other benefits where eligible (sick, vacation, workers compensation etc.).

Managers/Supervisors

Close to the start date managers should contact new hire regarding their first day with the following information:

- Start date and time
- Regular work schedule
- Who they will be reporting to
- Location (Department Location)
- Parking Information (Permits, where to park)
- Reminder to complete onboarding paperwork sent by HR

Temporary & Hourly Employees

Managers and supervisors are responsible for keeping track of working hours and days for temporary and hourly employees. Please view Appendix 3 for both the SEIU 1021 and Local 39 Acknowledgement forms and the types of temporary and hourly employees.
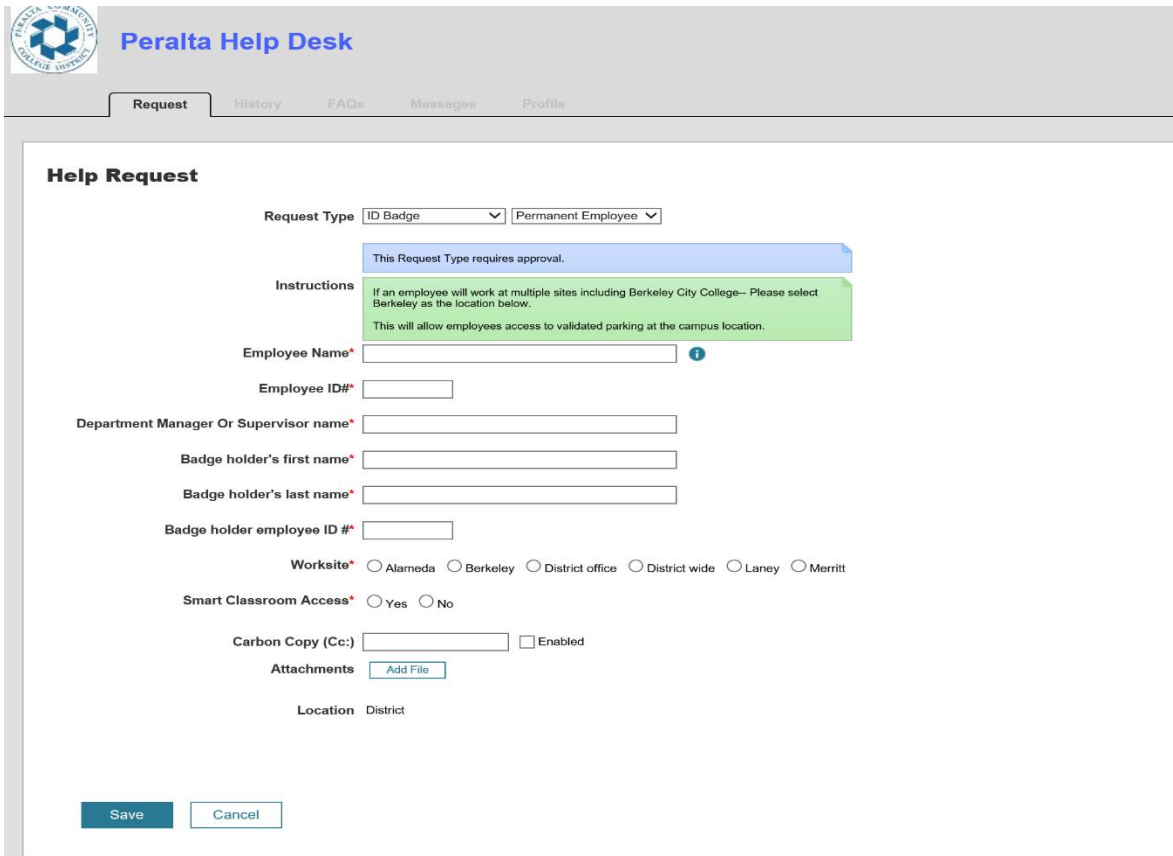
IT

After HR clears the new hire to start, IT will receive a notification to create a Peralta email account.

Managers will need to work with IT:

- To submit any equipment requests before their first day
- Ensure new hire's email has been created
- Check to make sure any programs/software needed by new hire is provided

Request ID Badge from IT

1. Open any browser, and type http://helpdesk.peralta.edu on the address bar.
2. Login with your Peralta email account.
3. Select "Request Type" as "ID Badge" like below and fill out relevant content as requested.

4. Once you click on "Save", the system will create a ticket and process it automatically.
5. Wait until the creation of your ID badge is finished. You will receive a notification message.

The detailed Manager Checklist in Appendix 1 will assist the manager to ensure the new hire is ready for their first day.

BEFORE THE FIRST DAY

When a candidate has been selected, the onboarding process starts. Once the candidate accepts the position, the manager/supervisor can begin planning for the new employee's first day/week.

A great deal of the work necessary to successfully onboard a new employee is done before the employee's first day. Some of the suggested actions to "prepare" for a new employee are listed below.

Prepare for the Employee's First Day/Week

First impression matters. It is important managers/supervisors adequately plan the essential activities for the new employees first day (and weeks) by coordinating and/or scheduling critical appointments and meetings (e.g. team members, Department Heads, Subject Matter Experts (SME), System Administrators, Department Payroll/Personnel Coordinators, committee and team meetings, etc.).

"YOU NEVER GET A SECOND CHANCE TO MAKE A FIRST IMPRESSION." -Will Rogers

WWW.INSPIRETHEBOOK.COM

While in many instances most of the on-the-job training and development will be provided by the employees' direct manager/supervisor, SME's can also be valuable resources in the onboarding experience. SME's can provide training on specialized, department, industry, or job-specific software applications, program, and policies, as well as position and operational functions.

In addition to scheduling appointments and job-specific training, managers/supervisors should gather links to important websites, as well as resource manuals, handbooks, and guides. These may assist the new employee in understanding his/her work and understanding essential information required to perform his/her job.

Managers/supervisors may also want to consider assigning a buddy (if applicable) to a new employee. The buddy can be a useful resource and partner for the manager/supervisor. The buddy can offer advice, guidance, knowledge, and resources regarding the day-to-day aspects of working for the new employee's immediate work environment.

Organize and Prepare the Workspace, Equipment, and Tools

A clean and organized workspace, with properly functioning equipment, is an important element in ensuring the employee can be productive, efficient, and effective as quickly as possible. Gathering basic office and/or desk supplies, collecting physical keys to cabinets, office, and/or building, as well as verifying a working phone, computer, and/or other equipment can create a smooth first day and make a good first impression.

Equally important is ensuring the employee has access, including User ID's/account numbers, and temporary password information to voicemail, essential directories, systems, and applications. If the equipment is not available, or is in need of replacement or repair, coordinate with the appropriate parties as quickly as possible.

Notify Others of the New Hire

Onboarding is a collaborative effort. It is important that the manager/supervisor notifies the rest of the department when there's a new hire. Colleagues are more likely to assist in onboarding if they are informed of a new hire. Sending an email to colleagues and partners regarding a new hire not only lets them know who is starting and when, it also welcomes the new employee.

Some useful tips for drafting a new hire announcement are:

- Be Upbeat – share your excitement for the new hire
- Be Brief – provide background, such as the employee's name, position, start date, what their job/role and responsibilities will be, where the employee will be located (and contact information, if known), as well as a brief employee bio.
- Be Collaborative – encourage colleagues to say hello and welcome the new employee to the team and acclimate him/her to his/her role.

Connect with the Employee before their first day

Before the employee's first day it is important to touch base to confirm first day details and answer any questions they may have.

THE FIRST DAY

The first day(s) and week(s) are opportunities for a new employee to connect with his/her supervisor/manager and members of his/her team. The focus for most employees during their first day(s) and week(s) is primarily to be acclimated to their team, different processes, systems, physical environment, and organizational structure.

Every supervisor and manager orients staff differently but all are encouraged to include the following elements in your first day(s) and week(s) on the job.

- *Welcome them upon arrival, provide a tour of their department and campus, where they can park, and introduce team members*
- *Review operations, organizational structure, job description and expectations*
- *Show their assigned workspace*
- *Assist with Peralta email set-up and other required system access*
- *Provide any necessary supplies and/or equipment*
- *Review training plan and schedule for the week*

Be sure to schedule time to check-in with the new employee to provide an opportunity to answer questions and address any concerns or challenges. Encourage the employee to ask questions and allocate sufficient time to listen and address questions the employee may have.

Regular meetings with employees should continue. The frequency of meetings should be determined by the manager as needed.

During the employee's first week, manager/supervisors should verify that the new employee has the tools and access to be successful. In addition, managers/supervisors should ensure the employee is able to use the email and voicemail system, able to access information on the various network drives, as well as internal and external websites.

THE FIRST MONTH

During the first month, employees begin to grow and develop their skill set and knowledge base and should begin to assume a regular workload. This period is critical to forming employee perceptions about Peralta and their position. Managers should use this period to establish the foundation for a solid working relationship.

Discuss Performance Factors, as well as initial Performance and Development Goals

During regularly scheduled one-on-one meetings, managers should ensure new employees attend the Human Resources New Hire and Benefits orientations. Managers should also review performance factors and define the performance standards for all staff. **Managers are encouraged to review the job description with the employee. It is important for the manager and the employee to understand the essential functions and responsibilities associated with the position.**

Managers should also set initial performance and development goals for the two-month and fifth-month probationary periods. Specific, measurable, achievable, realistic and timely (SMART Goals) create mutual understanding by clearly identifying what constitutes successful performance.

During the probationary period performance and development goals may focus on learning new skills required to effectively perform work, learning software systems and applications, understanding operations, and gaining technical information.

PERFORMANCE EVALUATIONS

CLASSIFIED PERFORMANCE EVALUATIONS

Two month and six-month probationary evaluations

The initial probationary performance evaluation for all regular classified employees is scheduled for the end of the second month of service. There are standardized forms for each classified group (SEIU

1021, Local 39, and Confidential). Managers can download performance evaluations forms on the [HR Documents and Forms](#) page on the Human Resources website. Please be sure to use the correct form. The evaluation should be reviewed by the College President or Vice Chancellor before it is presented to the employee. The first level manager presents and discusses the evaluation with the employee. Both the manager and the employee sign the evaluation after completing the review. If the employee refuses to sign the evaluation it is still in effect, simply indicate on the evaluation form the employee's refusal to sign then forward the evaluation to Human Resources. Provide the employee with a copy of the evaluation and forward the original document to Human Resources to be placed in the personnel file. **(Note: A reminder of upcoming probationary evaluations will be sent out to the direct report's manager at the beginning of each month by HR. Annual notifications will be sent out each July at the start of the fiscal year).**

Final Probation Evaluation

Congratulations! You and your employee have hit the six-month mark in their employment. The first six months of employment are crucial to an employee's retention with an organization. Upon completion of the six-month probationary period, the employee attains permanent status.

The final probationary evaluation should be completed at the end of the fifth month of service. On this evaluation, the manager confirms if the employee is recommended for continuation in their present position. If the employee does not meet performance expectations, the manager may release the employee prior to end of the six-month probationary period.

The manager adheres to the same guidelines provided for the two-month evaluation. After completing and presenting the final probationary evaluation, the manager provides the employee with a copy and forwards the original evaluation to Human Resources to be placed in the personnel file.

ADDITIONAL PERFORMANCE EVALUATION INFORMATION

Managers can find detailed evaluations procedures in Articles 5 and 8.16 of the [SEIU Collective Bargaining Agreement,](#) and Articles 7.2 and 19 of the [Local 39 Collective Bargaining Agreement.](#)

A manager may request to extend the probationary period if they need more time to assess an employee's performance. To request an extension, the manager must first contact Employee Relations for approval. Extensions may be granted up to an additional six months. An initial evaluation must be completed before requesting an extension.

"My performance review says I have trouble accepting responsibility. Is that MY fault?!"

In the event of absence from work for any reason for 10 consecutive days or more, the probationary period shall be extended by the duration of the absence. (A "day" is any day on which the District Office of the Peralta CCD is open for business). The District Office shall give the employee notice of such extension.
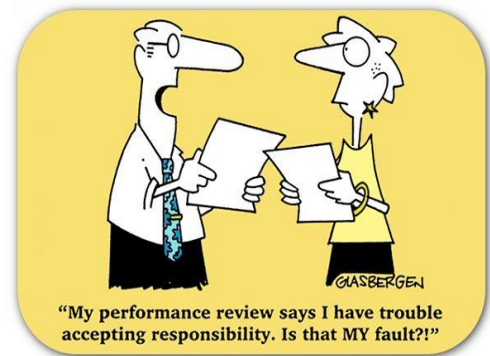
Human Resources sends the manager courtesy email reminders for probationary evaluations. However, managers are encouraged to plan and schedule their employee's probationary evaluations.

FACULTY EVALUATIONS

The information regarding the Faculty evaluation process can be found in the PFT Faculty and Evaluation Policies and Procedures Handbook.

The Department of Academic Affairs administers the faculty evaluation process. Please contact the department with any questions regarding faculty evaluations.

MANAGEMENT EVALUATIONS

Information regarding the management evaluation process can be found in the Administrative Procedure 7124 for Management Performance Evaluations.

New Managers

Within the first 60 days of employment, managers meet with the supervisors to discuss expectations and the framework for the establishment of goals and objectives which are to be aligned with the District's strategic goals and institutional outcomes located on the District's website: https://www.peralta.edu/about. Within 90 days of employment, each new manager, in consultation with his/her supervisor, shall establish performance goals appropriate for entering his or her new position. The new manager and his/her supervisor will meet, discuss, and finalize the goals. At the end of six months, the new manager and supervisor will meet to discuss progress. Any written comments shall provide encouragement and/or direction as appropriate. At the completion of the first year of a manager's employment, the supervisor shall complete a written report reviewing the manager's performance.

Annual Evaluations

All managers will be evaluated annually and establish annual professional goals, which align with the Districtwide institutional goals and link between District Office and college goals.

Comprehensive Evaluation

Every third year, a comprehensive evaluation will be conducted. The evaluator and employee will prepare a list of individuals to participate in the peer/staff evaluation feedback. The individuals identified should include persons within the employee's sphere of influence and/or persons who are knowledgeable of the employee's work, including all full-time faculty and a representative number of part-time faculty in a particular division or department, staff, peers, students, and, where appropriate, community members, vendors or service providers. Everyone will be asked to complete an evaluation using the Peer/Staff Evaluation Feedback Form. The comprehensive evaluation also includes a self-evaluation, assessment of District goals, and an evaluation of the previous year's performance.

SUMMARY

Successful onboarding and orientation require time, effort, and communication between the employee, manager, and team members. Ongoing support and an open line of communication help provide employees with the feedback and resources required to successfully acclimate to the Peralta community, adequately perform their job functions, and feel they are valued members of the Peralta Community College District.

Manager Checklist for Onboarding New Employees

Employee Name: _____

BEFORE THE FIRST DAY

☐Create eFORM with the following information:

*Faculty Hires: eFORM needs to be in HR queue a month before start date; All other hires as soon as possible once candidate is selected

  ☐Start Date

  ☐Salary Information (Rank/Step if required; No salary for Faculty)

  ☐Position Information (Job Code)

☐Faculty Hire Additional Requirements:

  ☐Specify in Comments Section Type of Hire (Teaching, Counseling FDIP)

  ☐Specify in Comments Discipline

☐Ensure eFORM is Approved and HR Has Cleared New Hire to Start

☐Contact New Hire Regarding First Day

  ☐Start Date and Time for First Day

  ☐Who to Report to on First Day

  ☐Department Location

  ☐Parking (Where to Park)

  ☐Regular Work Schedule

  ☐Reminder to Complete Onboarding Paperwork from HR

☐Prepare Workspace

  ☐Phone

  ☐Computer/Laptop

  ☐Email, User ID, Access to Software

☐Desk Supplies (Pens, Notepads, Staplers, etc)

☐Access to Other Equipment (Printer, Keys to Cabinets, etc)

THE FIRST DAY

☐Welcome New Hire

☐Provide Tour & Introductions

    ☐Department and Team Members Introduction

    ☐Work Area (Printer, Breakroom, Restroom, Supplies, etc)

    ☐Emergency Exits & Plan

☐Meet One on One

    ☐Ensure Employee Has Access To Email & Software

    ☐Show Employee Peralta Website

    ☐Review Job Description

    ☐Review Operations

    ☐Review Expectations

    ☐Answer Any Questions/Concerns

    ☐Review Training Plan and Schedule for Week

THE FIRST MONTH

☐Meet One on One

    ☐Discuss Performance Factors

    ☐Discuss And Set Future Performance Goals

    ☐Discuss Any Questions/Concerns From Employee

    ☐Review Job Description and Expectations

    ☐Ensure Employee Attended HR's New Hire Orientation

    ☐Ensure Employee Attended Benefits Orientation (If qualified for Benefits)

    ☐Ensure Required HR Documents Are Submitted (Faculty: Transcripts & Work Verification)

Welcome to Peralta Community College District!
New Employee Onboarding Plan

Employee Details

Name:

Employee ID:

Peralta Email:

Work Schedule:

Training Partners:

Training Schedule

Week One

- Introductions
- Welcome Meeting with Manager
- System Access Setup
- Tour of facilities and workspace

Week Two

- Check in meeting with manager

Week Three

Week Four

New Employee Resources

IT Help Desk – helpdesk@peralta.edu

Human Resources website

Payroll – Districtpayroll@peralta.edu

Benefits Department – benefits@peralta.edu

Parking – Please inquire with your manager or Campus Business Office

PERALTA COMMUNITY COLLEGE DISTRICT
Acknowledgement form for SEIU 1021 short-term hourly employees for July 1, 2021 – June 30, 2022
Form must be completed & submitted with an ePAF

I acknowledge (by signature below) that I am being recommended for hire in the position checked below for the maximum number of allowable days of service. I understand my employment will not commence until all HR employee intake procedures are fulfilled and verified, including fingerprinting. I also acknowledge that the duration of my employment may be subject to change by management.

Instructional Assistant/ (Discipline) under 500 hours per Fiscal Year
☐
- BOARD APPROVAL REQUIRED
- Any person who is employed on a short-term basis to perform a Continuing Service for no more than 500 hours per Fiscal Year
- Must be approved by the VPI and College President as one of the 85 district-wide allocated positions
- **Hours must be monitored by the Immediate Manager and timesheets should be reviewed to ensure compliance.**

Short-Term (Continuing Service) Employee "Seasonal Employee" up to 65 working days per Fiscal Year"
☐
- BOARD APPROVAL REQUIRED
- Any person who is employed on a short-term basis to perform a Continuing Service for no more than 65 Days
- "Only one per position per Department – Employee cannot exceed 65 days district-wide in any seasonal position."
- **A calendar of actual dates to be worked must be sent to HR. Days must be monitored by the Immediate Manager.**

Short-Term (Continuing Service) Employee "Seasonal Employee" up to 65 working days per Fiscal Year
☐
- BOARD APPROVAL REQUIRED
- APPLICABLE FOR *A&R, Assessment, Financial Aid & Cashiers' Office*
- The District may simultaneously employ Short-Term (Continuing Service) Employees, each for no more than an aggregate of 65 Days in any Fiscal Year, to perform a Continuing Service pursuant to the same job titles working in the same department if the peak demands of the work in such department reasonably require additional employees working simultaneously to timely complete it, so long as such Short-Term (Continuing Service) Employees are different persons.
- Please see HR for clarification.
- **A calendar of actual dates to be worked must be sent to HR. Days must be monitored by the Immediate Manager.**
- Seasonal employees hired within the same department should share the same working days (calendars must be identical).

Short-Term Non Continuing Service Employee (up to 184 working days per Fiscal Year)
☐
- BOARD APPROVAL REQUIRED
- <mark>PLEASE CONTACT HR FOR CLARIFICATION BEFORE YOU SUBMIT THIS CATEGORY OR IT WILL NOT BE APPROVED</mark>
- Non-Continuing Service means a service which is not a Continuing Service, and upon the completion of which, the service required or similar services will not be extended or needed on a continuing basis. *Position was not utilized last fiscal year by Department and individual to be recommended was not employed district-wide in same position or similar capacity previous year.
- POSITION - Not needed last fiscal year or next fiscal year.
- PERSON - Individual did not work as a 184 working employee in same position or performed similar duties last year on a district-wide basis
- **A calendar of actual dates to be worked must be sent to HR. Days must be monitored by the Immediate Manager.**

Short-Term (Continuing Service) Employee: Lifeguards (Laney Only) Less than 500 hours per Fiscal Year per individual.
☐
- BOARD APPROVAL REQUIRED

Interpreters and Instructional Assistants/DSPS – up to 184 working days per Fiscal Year
☐
- BOARD APPROVAL REQUIRED

Substitute - Recruitment (Effective July 1, 2007 - 90 calendar days allowed from first date of hire)
☐
- Used when recruiting for permanent employees. The request to advertise must be approved before an individual can work in this category

Substitute - Temporary Leave of Duty (up to 184 working days per Fiscal Year)
☐
- Means any person who is employed to replace any active Classified Employee who is temporarily absent from duty.

Returning Retiree – up to 960 hours per fiscal year
☐
- BOARD APPROVAL REQUIRED
- Means any person who is retired from the CalPERS retirement system. 180 day wait period from date of retirement required.

_____   _____   _____
Print Applicant Name   Signature   Date

By signing below, the manager accepts responsibility for tracking the employee's working days to ensure that they do not exceed the allowable days, and acknowledges that no extensions or exceptions are allowed to the provisions above.

_____   _____   _____
Print Manager Name   Signature   Date

Please return original to HR, copy to immediate manager, and employee (rev. 9/23/21)

Acknowledgement Form
Local 39 and Confidential short-term hourly employees
July 1, 2021 – June 30, 2022

I acknowledge (by signature below) that I am being recommended for hire in the position checked below for the maximum number of allowable days of service. I understand my employment will not commence until all HR employee intake procedures are fulfilled and verified, including fingerprinting. I also acknowledge that the duration of my employment may be subject to change by management.

☐ **Short-Term Non Continuing Service Employee (up to 184 working days per Fiscal Year)**
- **BOARD APPROVAL REQUIRED**
- **PLEASE CONTACT HR FOR CLARIFICATION BEFORE YOU SUBMIT THIS CATEGORY OR IT WILL NOT BE APPROVED**
- Non-Continuing Service means a service which is not a Continuing Service, and upon the completion of which, the service required or similar services will not be extended or needed on a continuing basis. "Position was not utilized last fiscal year by Department and individual to be recommended was not employed district-wide in same position or similar capacity previous year.
- **POSITION** - Not needed last fiscal year or next fiscal year.
- **PERSON** -Individual did not work as a 184 working employee in same position or performed similar duties last year on a district- wide basis

☐ **Substitute for Recruitment**
- Used to fill a vacancy when a position is in the process of recruitment
- Requires approved Request to Advertise
- Local 39 Employees – 90 calendar days from first date of hire
- Confidential Employees – 60 calendar days from first date of hire

☐ **Substitute for Temporary Leave of Duty (up to 184 working days per Fiscal Year)**
- Means any person who is employed to replace any active Classified Employee who is temporarily absent from duty.

☐ **Returning Retiree – up to 960 hours per fiscal year**
- **BOARD APPROVAL REQUIRED**
- Means any person who is retired from the CalPERS retirement system. 180-day wait period from date of retirement required

_____   _____   _____
Print Applicant Name   Signature   Date

By signing below, the manager accepts responsibility for tracking the employee's working days to ensure that he/she does not exceed the allowable days, and acknowledges that no extensions or exceptions are allowed to the provisions above.

_____   _____   _____
Print Name of Immediate Manager   Signature   Date

Please return original to HR, copy to immediate manager, and employee