

Project Title:

CAS Business Office Onboarding Implementation

Project Overview, Background and Description:

The onboarding implementation for the CAS Business Office aims to streamline, document, and enhance the onboarding process for new hires within our organization. This system will automate various onboarding tasks, improve communication and organization, and provide a more seamless experience for both new employees, the HR department, and our hiring departments.

Objectives:

- Develop a user-friendly onboarding platform via Smartsheet to facilitate a smooth and efficient onboarding process.
- Create a Sharepoint site exclusively for onboarding and skill development, which will walk new hires through onboarding one step at a time.
- Automate certain onboarding tasks such as paperwork completion (as much as possible), document submission, orientation, access, equipment disbursement and training.
- Enhance communication between HR, Operations, supervisors, and new employees during the onboarding process.
- Ensure compliance with university policies and legal requirements throughout the onboarding journey.
- Partnerships with stakeholders in central offices across campus to provide the most comprehensive and helpful onboarding journey for new staff.

Project Scope:

- A. Onboarding tool (via Smartsheet, outside of MyTrack)
 - a. Personal information collection
 - b. Document submission and verification
 - c. New hire paperwork
 - d. Orientation scheduling and tracking
 - e. Employee welcome packet acknowledgment
 - f. Equipment disbursement tracking
- B. Onboarding Sharepoint
 - a. Step by step, guided onboarding and university information
 - b. Easy to follow checklists
 - c. Various calendar and contact information
 - d. Skill development options and facilitation (Training & Development)
- C. SharePoint filing development
 - a. Personnel file development for CBO HR custodianship
 - b. Appropriate security pathways based on user roles
 - c. Maintaining policy compliance with records and retention schedules
- D. Integration
 - a. Integration with existing HR Smartsheet and processes
- E. Communication Channels
 - a. Automated email notifications for onboarding tasks and deadlines
- F. Compliance and Security
 - a. Compliance checks for document submissions

b. Secure storage and handling of sensitive employee information

Exclusions:

Based on feedback from the Academic Unit Associate Directors, we will not be working to integrate onboarding specifics for the ASUs until a later, yet-to-be-specified date.

Deliverables:

- A. Fully functional Employee Onboarding System.
- B. User documentation and training materials.
- C. Integration documentation.
- D. Testing and user feedback.

Stakeholders

Name	Department/Company	Title	Email	Roles, Responsibilities, Notes
Teri Rowe	College of Arts & Science	Senior Director Academic Support	trowe@uoregon.edu	Project Sponsor
Danielle McCarville	Projects & Initiatives	Associate Director, Initiatives and User Experience	dmccarv2@uoregon.edu	Project Manager
Desiree Rhodes	Projects & Initiatives	Communications & Project Coordinator	drhodes@uoregon.edu	Project Coordinator
Vincent Panero	Projects & Initiatives	Communications & Project Coordinator	vpanero@uoregon.edu	Project Coordinator
Tiffany Lundy	UO HR: Learning & Development	Senior Associate Director Employee Development & Engagement	tlundy@uoregon.edu	SME, collaborator, relevant URL: https://hr.uoregon.edu/universityhumanresourcesdirectory
Sara Garcia	CASDAS HR	HR Ops & Payroll Specialist	saramg@uoregon.edu	SME, collaborator
Laci Hutto	CASDAS HR	HR Ops & Payroll Specialist	lhutto@uoregon.edu	SME, collaborator
Amber Reasoner	CASDAS HR	HR Ops & Payroll Specialist	reasoner@uoregon.edu	SME, collaborator
Jen Rea	CASDAS HR	Assoc. Director HR	jenrea@uoregon.edu	Steering Committee
Crystal Sappe	CASDAS HR	Talent & Acquisition Manager	ckarsen@uoregon.edu	Steering Committee
Amy Stapleton	CASDAS HR	HR Ops & Payroll Manager	astaple@uoregon.edu	Steering Committee
Kayleen Cautrell	Operations, Travel, Events & Creative Design	Assoc. Director Ops	cautrell@uoregon.edu	SME, collaborator
Lisa Mick Shimizu	Dean's Office	Director of Operations & Strategic Initiatives	Lisa@uoregon.edu	Collaborator

Affected parties:

The CAS Dean's Office will be partnering with us to develop and test onboarding for their space as we go along. See "exclusions" for other potential stakeholder partnerships.

Implementation plan:

A. Project Kickoff

- a. Onboarding committee will meet several times to discuss scope, variables, and data requirements
- b. Assignments for development of workflows and processes will be decided

B. System Development

- a. Data collections for the onboarding system will commence
- b. Smartsheet onboarding development based on approved design and requirements will be undertaken
- c. Perform testing along the way with HR & Operations

C. Integration and Data Migration

- a. Integrate new system into existing Smartsheet and SharePoint site and files
- b. Conduct testing to verify data flow

D. Training and Documentation

- a. Develop comprehensive user documentation for HR administrators, managers, and new employees
- b. Conduct training sessions for system users
- c. Provide training materials and resources for ongoing reference

E. User Acceptance Testing (UAT)

- a. Invite key stakeholders and end users to participate in UAT
- b. Address and resolve any issues identified during the testing phase
- c. Obtain formal signoff from stakeholders indicating acceptance of the system

F. Communication Planning:

- a. Develop a communication plan to inform all relevant parties about the upcoming onboarding system launch
- b. Outline key features, benefits, and user instructions
- c. Schedule informational sessions and Q&A sessions for employees

G. Prelaunch Preparation:

- a. Conduct a final system check to ensure everything is in order
- b. Verify that all necessary configurations are in place
- c. Prepare support teams for potential inquiries during the initial rollout

H. Pilot Launch:

- a. Implement a pilot launch with a select group of users or departments
- b. Gather feedback and identify any unforeseen issues
- c. Make necessary adjustments based on pilot feedback

I. Full System Launch:

- a. Roll out the onboarding system to the entire organization
- b. Monitor system performance and user feedback
- c. Provide additional support resources for the initial launch period

J. Ongoing Monitoring and Support:

- a. Establish a system (SOP) for ongoing monitoring and maintenance
- b. Address any postlaunch issues promptly
- c. Provide continuous support and resources for user

K. Performance Evaluation:

- a. Evaluate system performance against predefined benchmarks
- b. Gather feedback from users and stakeholders
- c. Identify areas for improvement and plan for future enhancements

L. Documentation Updates:

- a. Update documentation based on user feedback and any changes made postlaunch
- b. Ensure that documentation remains current and relevant for user

M. Continuous Improvement:

- a. Establish a process for collecting ongoing feedback
- b. Schedule regular reviews to identify opportunities for system enhancement
- c. Plan for future updates and feature additions

High level timeline/schedule:

- A. Project Kickoff: January 31, 2024
- B. System Development: February 19 – March 31, 2024
- C. User Testing: April 1 – April 30, 2024
- D. Training Sessions: May 1 – May 31, 2024
- E. Final Checks and Feedback Implementation: June 1 – June 7, 2024
- F. Implementation: June 12, 2024
- G. Project Completion: August 2, 2024

Quality Standards:

- A. User experience:** Feedback will be collected from new hires upon completion of the onboarding stage of the new processes.
 - a. Ensure the onboarding platform is user-friendly and intuitive.
 - b. Conduct usability testing to identify and address any user experience issues.
- B. Data Accuracy and Integrity:**
 - a. Validate and verify data accuracy during the onboarding process.
 - b. Implement checks and validations to prevent data entry errors.
 - c. Ensure secure storage and handling of sensitive employee information.
- C. System Reliability:**
 - a. Conduct thorough testing of the onboarding system for reliability and stability.
 - b. Implement backup and recovery mechanisms to safeguard against data loss.
- D. Compliance and Legal Standards:**
 - a. Ensure that the onboarding process complies with local labor laws and regulations.
 - b. Implement mechanisms to collect and verify necessary legal documents.
 - c. Regularly update the system to adapt to any changes in compliance requirements.
- E. Communication Standards:**
 - a. Implement secure and reliable communication channels.
 - b. Provide clear and timely notifications to users about onboarding tasks and deadlines.
- F. Training and Support:**
 - a. Develop comprehensive user documentation and training materials.
 - b. Provide ongoing support mechanisms for users encountering issues or requiring assistance.
- G. Reporting:**
 - a. Provide reporting functionalities for HR administrators to monitor onboarding progress.
- H. Feedback Mechanism:**
 - a. Implement feedback mechanisms to gather input from users for continuous improvement.

b. Regularly review user feedback and incorporate relevant improvements.