

ONBOARDING PROGRAM RESOURCE GUIDE

FOR DEPARTMENT HEADS AND HIRING MANAGERS



COOK COUNTY OFFICES UNDER THE PRESIDENT
BUREAU OF HUMAN RESOURCES



Table of Contents

Overview	3
Onboarding Program.....	3
Getting Started – The Hiring Process (<i>Excluding Shakman Exempt positions</i>).....	4
The Hiring Department	4
BHR Workforce Strategy Division	4
Preboarding.....	5
BHR Personnel Services Division	5
Before Your New Employee Starts	6
Prepare for the new employee	6
Set Up Your New Employee’s Workspace.....	6
Welcome Your New Employee.....	7
Welcome Email (templates provided by BHR).....	7
Department Email (templates provided by BHR)	7
Office Culture & Employee Expectations	7
Create Goals.....	8
Create a Department Specific Training Plan	8
The Employee’s First Day	9
Employee’s First Day – New Employee Orientation	9
First Day in the Department – Department Orientation	10
Topics to Discuss with Your New Employee Department and County Overview	10
Oracle EBS Employee Self-Service and Cook County Time Overview	10
Tips for a Successful First Week	10
Topics to Cover in Your One-on-One Meetings	11
Employee’s First 30 Days	11
A Few Things to Discuss in The First 30 Days.....	11
RESOURCES: Department Hiring Checklist	12
RESOURCES: Preboarding Checklists	13
RESOURCES: Cook County Employee Identification Card Request Form.....	14
RESOURCES: Employee Inventory Checklist	15
RESOURCES: Welcoming Your New Employee – Department Checklist.....	16
RESOURCES: Checklist for New Supervisors	19
RESOURCES: Welcome Email Templates	20
RESOURCES: New Employee Workspace Checklist.....	22
RESOURCES: Setting Employee Expectations Guide.....	23
RESOURCES: Creating Goals for Your New Employee	24
RESOURCES: SMART Goals Worksheet.....	26
RESOURCES: New Employee Checklist	27
RESOURCES: Definitions	29

Overview

Onboarding at Cook County government is more than a single event. It is an engaging experience designed to make new employees feel welcomed in their surroundings and minimize the time it takes to become productive members of their department. It begins before the new employee steps foot in a Cook County facility. Onboarding requires the successful collaboration of Human Resources, Technology, Budget and Management Services, Facilities Management, Risk Management, and the Hiring Department to align the hiring process. The objective is to intentionally connect the new employee with current team members, help them get acclimated and up to speed, and finally, set short-term and long-term goals that include relevant training and professional development opportunities.

Our goal is to contribute to employee loyalty and commitment, give the employee the tools to be successful and provide strategies to navigate within their new work environment. Positively impacting employee success through a successful onboarding program increases the County's retention of a highly competent, diverse, and engaged workforce. Effective onboarding:

- a) improves productivity
- b) enhances loyalty and engagement
- c) helps new employees become successful early in their careers with the County

It is a process that can take up to a year to complete and impacts turnover, safety, absenteeism, customer service, and work quality. If done right, the onboarding process creates the foundation for long-term success for the employee and the employer.

Department managers and supervisors play a key role in the onboarding experience. To support the Department's role, we have created checklists to guide you through each phase of onboarding. We need your assistance in providing our new employees with an onboarding experience that will set them up for success in their new roles at Cook County Government.

Onboarding Program

The onboarding program, facilitated by the Bureau of Human Resources (BHR), requires the cooperation of other Bureaus and Departments to successfully complete the various phases of the program: Hiring Process, Preboarding, and Onboarding. The Hiring Process is governed largely by the Cook County Employment Plan. The Preboarding process begins once an employee has accepted an offer of employment with Cook County Government. Onboarding begins on the employee's first day and may continue through the first year of employment.

The following is an overview of how Bureaus and Departments work together to efficiently execute the successful entrance of new employees to Cook County employment. More detailed checklists are included in the Resource Section (see [Welcoming Your New Employee Checklist](#)).

Getting Started – The Hiring Process *(Excluding Shakman Exempt positions)*

Job descriptions must be finalized and approved prior to submitting a Request to Hire (RTH). A new job description is required when the title of the position does not exist. A revised job description is required when a material alteration must be made to an existing job description or the existing job description is inaccurate. The Hiring Department must contact Workforce Strategy at BHR.jobdescriptions@cookcountyil.gov to initiate the job description development process.

The Hiring Department

The Hiring Department determines the operational need to fill a vacancy or create a new position. Once determined, the Hiring Department should:

- Review the job description to determine if updates are needed. Be sure the job description aligns with the work you intend the new employee to perform in the position. If the job description requires revisions or creation, departments should consult the BHR Workforce Strategy Division to formulate the job description.
- Complete the RTH process in the Oracle Enterprise Business System (EBS), thereby notifying the department's budget analyst in the Department of Budget and Management Services (DBMS). In addition, complete the RTH hardcopy for submission to the budget analyst.
- Upon notification of approval of the RTH by DBMS, send both a hard copy of the approved RTH (with the Department Head's signature) and job description to the BHR Workforce Strategy Division for posting.

BHR Workforce Strategy Division

Upon receiving the DBMS approved hard copy RTH and the current approved job description, the Workforce Strategy Division completes the following next steps:

- Conduct a final review of the job description
- Create an electronic posting for the job opportunity
- Complete the General Hiring Process as defined by and prescribed in the Cook County Employment Plan
- Upon selection of a candidate, make an offer of employment pursuant to the General Hiring Process, notify the Hiring Department of the selected candidate's acceptance, and create a Hiring Packet for further processing by the BHR Personnel Services Division.

**Note: All County job offers are conditional upon successful background check clearance.*

Preboarding

BHR Personnel Services Division

Following the candidate's acceptance of an offer of employment, the Preboarding process begins. Upon receiving the Hiring Packet from the Workforce Strategy Division, the Personnel Services Division takes the following next steps:

- Contact the new employee via email (and phone, if necessary) to schedule an appointment for pre-employment screening, attaching documents to be completed by the candidate and returned at the time of the appointment.
- Perform fingerprinting for the background check, schedule any necessary drug testing, and physical examination (for safety sensitive positions only).
- After the new employee clears all necessary pre-screening checks and examinations noted above, Personnel Services will notify the Hiring Department of such clearance and work with the Hiring Department to determine the new employee's start date.
- Email the new employee confirming the start date, with specific information regarding date, time, and location of New Employee Orientation. Include a link to the Reasonable Accommodation Policy.
- Email the Hiring Department confirming start date (start date should be equal to the first date of the pay period). The email requests the Department submit Cherwell tickets to the Bureau of Technology (BOT) for system role assignments, computer hardware/software, and related telecommunication needs, as well as to Facilities Management to prepare the workspace and to obtain keys/key card access (see [Welcoming Your New Employee Checklist](#)). A copy is sent to the workforce strategy analyst, BHR Training Division, and to BOT, noting whether the new employee is a new hire or a rehire.
- Complete the Grant of Authority form and add it to the Hiring Packet.
- Submit the Hiring Packet to the BHR Chief Human Resources Officer or their designee for final approval, followed by entry into the EBS Oracle system by the Human Resources Information Systems Division (HRIS). HRIS will create the Employee ID# in EBS and return the Hiring Packet to Personnel Services.
- Create the new employee's personnel file.
- Create the ID Badge and provide it to the new employee on the day of the orientation.

In the event the new employee fails to clear any one of the pre-screening tests noted above, BHR takes necessary steps to further evaluate the new employee's eligibility for employment pursuant to applicable County policies, state and federal laws, and Equal Employment Opportunity guidelines.

Before Your New Employee Starts

Once the Hiring Department receives notice from BHR a new employee has successfully cleared the background check process and has a confirmed start date, the Department must take steps to prepare for the new employee's arrival.

Prepare For The New Employee

Did you print the Welcoming Your New Employee Checklist yet (see [Welcoming Your New Employee Checklist](#))? The checklist will provide you with a detailed list of actions to complete to effectively onboard your new employee. The Supervisor should distribute the [New Employee Checklist](#) to the new employee as a guideline for accomplishing all necessary steps.

Set Up Your New Employee's Workspace

Setting up your employee's workspace is a critical task that should never be neglected. The employee's space should be clean, organized, and welcoming, so the employee feels valued. The workspace also should be equipped with necessary equipment and the employee should have an assigned County email address on their first day of work. Working with partner departments, including BOT and Facilities Management as early as possible in the process is key to being prepared for your new employee's arrival.

Departments should complete the following tasks upon receiving notice of the new employee's start date and the creation of the new employee's ID number.

- At least five (5) business days in advance, submit one ticket via Cherwell (BOT's portal for technology related requests) that includes the following items:
 - 1) computer
 - 2) telecommunication (landline, email)
 - 3) network control, VPN, jacks, and access to computer drives and folders
 - 4) software (other than Microsoft Office)
 - 5) mobile phone
- Submit up to two (2) work orders to Facilities Management:
 - 1) one work order to acquire office furniture and request painting or cleaning of the workspace, if appropriate (three to five-day notice needed)
 - 2) a second work order for keys and key card access (five to seven-day notice needed).

**Note: for employees at 69 West Washington contact Transwestern Real Estate Services, Inc. at 312-603-0400. For employees at the Daley Center, contact the building management.*

Ask the following questions and review the New Employee Workspace Checklist (see [New Employee Workspace Checklist](#)) for a list of items to complete before your employee arrives:

- Do they have all the supplies needed to do their job?
- Will they need any special computer software?
- Is their workspace clean?
- Do they have a working phone? Do they have an extension?
- Do they need business cards? (If applicable to their roles and responsibilities, the department should submit an order to the County's Printing and Design Department)

Welcome Your New Employee

Welcoming your new employee is a big deal. New employees need to feel accepted and know their new supervisor and team are excited for them to start. To accomplish this, you must welcome the new employee and prepare them for their first day, but you also need to make sure your current staff knows a new employee will be joining the team. We have three easy methods of communicating to your new employee and to your department:

Welcome Email (templates provided by BHR)

Departments should send a welcome email to their new employee once the new employee has successfully cleared the background check and is ready to move to the next step of onboarding.

- How do I know if an offer letter has been sent?
 - Your workforce strategy analyst will include you in the offer letter email to the new employee.
- How do I know the new employee has cleared the background check?
 - Personnel Services will contact you regarding background check clearance and next steps.
- Where do I get the welcome email?
 - The email is in the Resource Section (see [Welcome Email to New Employee from Department](#)).

Department Email (templates provided by BHR)

We recommend sending this to your department a week prior to your new employee's start date. You can find a template of this email in the Resource Section (see [Sample Email to Department](#)). It may be edited to fit the needs of your department.

What to Include in the email:

- Introduce the new employee: summary of previous work experience.
- Where they will be working and on what team, if applicable.
- When is their first day?

Office Culture & Employee Expectations

You should have a list of expectations prior to your new employee's start date. Below are a few tips to get you started on creating expectations. You can also view the [Setting Employee Expectations_Guide](#) in the Resource Section (see [Setting Employee Expectations Guide](#)) for more detailed instructions on how to complete this process. These expectations should:

- Be related to the job description. Have a copy of the job description for you and the new employee to review.
- Provide guidance for day-to-day work.
- Be concise and use clear language.

Create Goals

Have goals ready for your new employee starting from their first week and, if possible, through their first year. We understand creating goals that far in advance can be difficult and it is likely the needs of your department and team will change, but goals can always be updated.

Goals are important to keeping your new employee engaged and contributing to the success of the department. We suggest using the SMART Goals method because it is easy to follow and outlines what should be included in each goal. You can find a detailed explanation of a guide to Creating Goals for your New Employee and SMART Goals Worksheet in the Resource Section (see Creating Goals for Your New Employee and SMART Goals Worksheet) along with sample 30 and 90-day goals. We also recommend watching the SMART Goals training session in Cook County Learns! for more details on creating SMART goals. T

A few things to remember when creating goals:

- Initial goals should be simple and easy to accomplish in the first week or two. You can gradually increase the difficulty and time commitment for the three (3) months, six (6) months, and first year goals.
- Review the goals often with the employee and make changes as needed. When making changes to the goals, do not forget to explain the reasoning for the change and any possible effects it could have on the already existing goals.

Create a Department Specific Training Plan

Having a plan of action for your new employee that gives them a clear outline of what to expect is very important. Even if it is just for their first week, it sets them up for success as they have a detailed plan of what to be working on during their first few days in the department. Review the Sample Training Schedule and edit to fit the needs for training your new employee.

- The training plan should include who, what, where, and when for each task listed:
 - Who will train them?
 - What is the expected outcome?
 - Where will the training take place?
 - When will the training take place? Week 1, 2, 30 days, 90 days out?
- Does the training plan align with their goals and expectations?
- What trainings do they need to complete their job?
- Does the supervisor have one-on-one meetings set up with the new employee to discuss their training progress?

See the [Welcoming Your New Employee Checklist](#) for additional tasks to be completed prior to the new employee's first day.

The Employee's First Day

The first weeks, and really the first 30 days, are the most important for you and your new employee. Studies show this is the time when the highest potential for turnover occurs. In fact, according to an online article by [The Harvard Business Review](#), 33% of new employees look for a new job within their first 6 months and 23% will turnover before their first anniversary. By having an organized and detailed onboarding plan from day one, you reduce the risk of turnover by 50.

It is important to recognize the first day and even the first week in a new job can be overwhelming for a new employee, especially if they are inundated with work prior to familiarizing themselves with the new environment and policies of the new employer. Orienting employees in the first week of employment facilitates a smooth transition to the new workplace.

Employee's First Day – New Employee Orientation

The new employee's first responsibility is to attend New Employee Orientation (NEO). NEO will be held every two weeks on Mondays (unless that Monday is a holiday; then NEO is held on Tuesday), from 8:30 a.m. to 4:30 p.m., coinciding with the first Monday of the County's pay periods, and will cover:

- A brief history of Cook County Government
- Policy and Procedures Overview
- Required compliance trainings
- Cook County BHR Website Tour
- Benefits Presentation

Orientation is led by the BHR Training and Development Division (BHR Training) and takes place in either the BHR Training Classroom, Room 885 of the County building at 118 N. Clark St., or conference rooms A, B, and C on the 22nd floor of the George W. Dunne building at 69 W. Washington St. The location will be included in the NEO invite, sent by the end of the day on the Friday before the NEO session. Please view the sample orientation agenda below.

Cook County New Employee Orientation Program Agenda

8:30 a.m. – 4:30 p.m.

8:30 a.m. – 9:00 a.m.	Welcome and introduction
9:00 a.m. – 9:15 a.m.	Welcome to Cook County Video
9:15 a.m. – 9:30 a.m.	Office of the Independent Inspector General
9:30 a.m. – 10:15 a.m.	Employment Plan Overview for NEO
10:15 a.m. – 10:30 a.m.	———— BREAK ———
10:30 a.m. – 11:00 a.m.	Ethics Overview
11:00 a.m. – 12:00 p.m.	Employee Benefits (Risk Management Programs)
12:00 p.m. – 1:00 p.m.	———— LUNCH ———
	Information Fair: Connect with other groups like Deferred Compensation - Nationwide
1:00 p.m. – 1:15 p.m.	Review of online resources: Policy Library, Oracle, Cook County Time, Cook County Learns, and County website
1:15 p.m. – 2:15 p.m.	Overview of the Equal Employment Opportunity Office, Preventing Sexual Harassment Training, Preventing Workplace Violence & Equal Employment Opportunity (EEO Policy and Review of Related Policies)
2:15 p.m. – 2:30 p.m.	———— BREAK ———
2:30 p.m. – 3:30 p.m.	Creating a Culture of Respect and Civility in the Workplace
3:30 p.m. – 4:00 p.m.	Policy Review and Acknowledgment Form, Handout Review, and Evaluation Form
4:00 p.m. – 4:30 p.m.	Confirmation of Attendance and Closing

New employees in supervisory and management positions are required to attend the following additional training sessions within 90 days of their start date.

- Employment Plan Training for Supervisors and Interviewers – offered during odd months
- Progressive Discipline – offered during even months
- Supplemental Policies – offered quarterly

First Day in the Department – Department Orientation

On your new employee's first day in the Department (second day as a County employee) take them on a tour of the office, facility, or building. Give them a brief overview of the schedule for the day and week if possible. Introduce them to the team and ensure they can log into their computer or kiosk.

We realize there are many topics to cover during an employee's first day in the new Department. We recommend creating a schedule for the day to make sure everything is covered. Below are some ideas for first day introductions.

Topics to Discuss with Your New Employee: Department and County Overview

Review the department's purpose, mission, goals, and organizational chart. This provides your new employee with an understanding and purpose of the work performed. Now is a good time to also talk about Cook County's goals and how your new employee's role fits into the bigger picture. Every department impacts the provision of County services, and every employee should understand the impact of their contribution.

Oracle EBS Employee Self-Service and Cook County Time Overview

Have your new employee log into the Employee Self-Service Portal and swipe into Cook County Time (CCT) to ensure activation of identification badges. Assign appropriate EBS and CCT roles. Please be sure they use their New Employee Checklist (see [New Employee Checklist](#)), which gives them a guide of what to review in each system. Key items to review are:

- Personal information
- Time and attendance reporting
- Pay and leave information

Tips for a Successful First Week

- Make sure you have goals and expectations ready before your new employee's start date.
- Schedule recurring One-on-One meetings, either weekly, biweekly, or monthly. These will probably be more frequent during the first few months your new employee is employed, so you can check in regularly on their performance and assist with questions they may have about the position and expectations.

Topics to Cover in Your One-on-One Meetings

One-on-One meetings should be happening with all your employees. It is important to get started with these meetings shortly after your new employee starts work.

During your first One-on-One meeting, give your new employee their first assignment and review goals and expectations. We also recommend discussing the following:

- Office Policies and Procedures
- Working hours
- Phone, email, and internet use
- Department and/or building specific safety and emergency information
- Office organization (files, supplies, etc.)
- Office resources
- How to clock in, request vacation/personal days, call in sick
- Staff meetings
- List of individuals to meet within the upcoming weeks
- Accountability
- Confidentiality
- Ethics
- Probationary period

Supervisor Expectations: If your new employee is a supervisor, be sure to give them the Checklist for New Supervisors (see [Checklist for New Supervisors](#)) and discuss your expectations for them in the supervisor role.

Welcome Checklist: Be sure to consult the [Welcoming Your New Employee Checklist](#) for additional tasks to be completed during your new employee's first week.

Employee's First 30 Days

As previously mentioned, you should have regularly scheduled One-on-Ones. One-on-Ones can be scheduled every week, every other week, or once a month. We suggest starting out with weekly One-on-Ones for the first month. After the first month, determine the frequency based on the feedback you receive from your new employee and their performance.

A Few Things to Discuss in The First 30 Days

- Discuss performance and professional development goals.
- Give the employee additional assignments.
- Have the employee attend professional development trainings when offered.

RESOURCES: Department Hiring Checklist

Hiring Department Hiring Process

- Decide to fill a vacancy or create a new position
- Review the job description to determine if updates are needed; consult with BHR to update or create the job description, if applicable
- Notify the Department of Budget and Management Services (BDMS) to determine if sufficient funds are allocated for the position
- Receive notification from DBMS of sufficient funds
- Contact BHR to begin hiring process
- Work with BHR Workforce Strategy Division to create interview questions
- Assign interview panel members
- Schedule and conduct interviews and score candidates' responses
- Create a selection committee to identify the final candidate
- Create and submit Decision to Hire and Requisition Forms to BHR with notes and ranking form
- Receive notification from BHR – Personnel Services Division the candidate has cleared the background check and provide the Personnel Services Division with the official start date

See the Welcoming Your New Employee Checklist, page 18 for Preboarding and Onboarding recommendations.

Department of Budget and Management Services Hiring Process

- Receive notification from the Hiring Department to initiate analysis that sufficient funds are allocated for the position
- Determine if sufficient funds have been allocated. If necessary, consult with the Hiring Department to resolve the insufficient funds issue
- Notify Hiring Department of approval to fill the position

Bureau of Human Resources Hiring Process

- Receive notification from the Hiring Department of decision to hire or fill a new position
- Notify the Hiring Department regarding sufficiency of the job description
- Create a job posting, eligibility list, and interview list for the position
- Tabulate the interview candidates' scores, transfer scores to ranking sheet, and provide the ranking sheet to the selection committee
- Send the offer letter
- Notify Hiring Department of candidate's acceptance
- Create a Hiring Packet

RESOURCES: Preboarding Checklists

Department Preboarding

- Receive notification from Personnel Services Division that new employee has successfully cleared the background check process
- Send hire date to Personnel Services
- Send ticket to BOT
- Send work order to Facilities Management

Bureau of Human Resources Preboarding

- Schedule a Pre-Employment Screening for the new employee, which includes a background check, medical examination, if necessary (Note: the completion of the background check may be delayed due to circumstances beyond the control of BHR)
- Send notification to the Hiring Department that the new employee cleared the pre-employment screenings and receive start date from Hiring Department
- Send written offer of employment to new employee indicating start date and New Employee Orientation
- Complete the Grant of Authority form and add it to the Hiring Packet
- Submit the Hiring Packet to the BHR Chief Human Resources Officer or their designee for final approval, followed by entry into the EBS Oracle system by the HRIS. HRIS creates the Employee ID# in EBS and returns the Hiring Packet to Personnel Services
- Create the new employee's personnel file. Email the Hiring Department confirming start date. Requests the Hiring Department submit Cherwell tickets to BOT and work orders to Facilities Management for computer and related telecommunication needs and to prepare the workspace and obtain keys/key card access. (See Welcoming your New Employee Checklist, page 18.) A copy is sent to the workforce strategy analyst, BHR Training Division and to BOT, noting whether the new employee is a new hire or a rehire.

Bureau of Technology Preboarding

- Receive Cherwell tickets from the Hiring Department requesting computer and telecommunications set up for the new employee
- Create an email account, calendar account, access to shared drives, and distribution lists
- Provide computer and telecommunication equipment to the Hiring Department
- Install any requested software for new employee
- Deliver mobile phone for new employee, if applicable necessary

Facilities Management Preboarding

- Receive work orders from the Hiring Department to provide, if necessary, furniture, cleaning, painting, key, and key cards/key card access for the new employee, to be completed prior to the start date

RESOURCES: Cook County Employee Identification Card Request Form

COOK COUNTY EMPLOYEE IDENTIFICATION CARD REQUEST FORM

Date: _____ Non-Employee Date of Expiration: _____

Employee Name: _____

Social Security Number: _____ Employee Identification Number: _____

Budget Title: _____

Department: _____ Dept. #: _____

STATUS OF EMPLOYEE CARD

_____ New I.D. Card to be issued

_____ Replacement of Worn-Out I.D. Card (**Fee waived only if old card is returned to I.D. Dept.**)

_____ Lost/Misplaced I.D. Card - \$10.00 fee (**Payroll Deduction**)

_____ Stolen I.D. Card (**Police Report – fee waived**)

_____ Renewal with new expiration date for non-employee IDs

SPECIAL REQUEST (FEE WAIVED) _____

_____ Change in name Former name: _____

_____ Change in title due to budget change

_____ Change in department due to budget change

_____ Transfer from one County Agency to another

Requested By: _____ **Phone Number** _____
(Please Print) *Timekeeper / Authorized Personnel*

Submit Identification Request Forms via email to:
BHRIDRequests@cookcountyil.gov

To obtain a Cook County Identification Card report to:
Personnel Services Department 118 N. Clark St., Room 834
Chicago, IL 60602
Monday – Thursday
9:00 am - 2:00 pm

RESOURCES: Employee Inventory Checklist



Click here for [Fillable Form](#)

(TO BE COMPLETED BY THE SUPERVISOR)

Employee: _____ **Employee ID#:** _____
Position: _____ **Dept. /Division:** _____
Supervisor: _____

COUNTY-OWNED PROPERTY (please check the appropriate boxes upon assignment and upon receipt of property)

	Description of Property	Assigned	Not Applicable	Retrieved
1	Employee Identification Badge			
2	Keys – Office and File Cabinet			
3	Cellphone/Pager (specify _____)			
4	Laptop/Tablet (specify _____)			
5	Camera (specify _____)			
6	Other electronic devices that may not be listed above (specify _____)			
7	County equipment (specify _____)			

DEPARTMENT RESPONSIBILITIES (ONBOARDING)

- Notify BOT (via Cherwell or servicedesk@cookcountyil.gov) to activate network access, email account, and other IT related services.
- Contact Telecommunications at (312) 603-1390, option 2, to reset voicemail.
- Obtain County employee identifications from BHR, Cook County Building, 118 N. Clark Street, Room 834.
- Follow the Countywide Key Control Policy to obtain office and file cabinet keys.
- If appropriate, obtain fleet car access card from Fleet Manager in the Bureau of Administration.

Department Head Signature **Date**
Upon employment, send copy of completed form to BHR.

DEPARTMENT RESPONSIBILITIES (OFFBOARDING)

- Notify BOT (via Cherwell or servicedesk@cookcountyil.gov) to terminate network access, email account, and other IT related services. Also, notify the Service Desk by telephone, (312) 603-1390, of IT user separation.
- Contact Telecommunications at (312) 603-1390, option 2, to reset voicemail.
- County employee identification cards must be returned to BHR, Cook County Building, 118 N. Clark Street, Room 881.
- The Service Desk should be notified of all BOT IT Resources (IT equipment/devices, cellphones, etc.) collected.
- For County employees who work at the George W. Dunne Cook County Administration Building, 69 West Washington, the building identification must be returned to the Office of the Building, 14th Floor, at (312) 603-0400.
- Return all Entry Resources (as defined in the Key Control Policy) to the Resource Manager (also defined in the Key Control Policy).
- Complete Personnel Action Form and forward it, electronically, to BHR.PAFChanges@cookcountyil.gov and to the appropriate Payroll Analyst within the Comptroller’s Office.
- Fleet car access cards should be returned to the Fleet Manager in the Bureau of Administration.

Department Head Signature **Date**
Upon employment separation, send completed form to BHR.

RESOURCES: Welcoming Your New Employee – Department Checklist

Employee Information

Employee Name: _____ Position: _____

Start Date: _____ Orientation Date(s): _____

Supervises Others: Yes No

Before Employee Start Date - Preboarding

- Send Employee Welcome Email (See Welcome Email to New Employee provided by BHR).
- Include:
 - General welcome to the department – include a link to department’s website
 - Agenda for the employee’s first day, including directions on where to go on the first day
 - Reporting date, office address
 - Dress code, if any
- Email Department information about the new employee: include start date, employee’s role, and biography, if applicable. Copy the new employee.
- Create a list of critical people the employee needs to meet during their first few weeks. Set up meetings with those individuals or provide the list to the new employee for them to set up meetings with once they begin working.
- Plan the employee’s first assignment.
- Submit one ticket via Cherwell (BOT’s portal for technology related requests) that includes the following items: (1) computer; (2) telecommunication (landline and email); (3) network control, VPN, jacks, and access to computer drives and folders; (4) software (other than Microsoft Office) and, (5) mobile phone. BOT requires a five-business day turnaround.
- Submit up to two (2) work orders to Facilities Management: (1) one work order to acquire office furniture and request painting or cleaning of the workspace, if needed (three to five-day turnaround needed); (2) a second work order for keys and key cards/key card access (five to seven-day lead time). Note: for employees at 69 West Washington or the Daley Center, contact the building management.
- Receive necessary equipment from BOT and items identified in the work orders submitted to Facilities Management
- Set up the workspace with supplies. Also, make sure the IT equipment (computer, printer, monitor, etc.) and phone are up and running properly for the employee.
- Order business cards and name plate if necessary.
- Assign EBS, CCT roles and/or Hyperion, as appropriate.
- Add employee to relevant email lists.
- Add regularly scheduled staff and department meetings to employee’s calendar.
- If you are unable to meet with the employee often, select another employee to act as a mentor/buddy for the new employee to provide guidance.

Employee's First Day - Onboarding

- New employees attend New Employee Orientation on their first day.

During Employee's First Week

- Arrange for a personal welcome from the Department Head.
- Provide the new employee a tour of their assigned workspace, department, and building. Be sure to also explain where restrooms and break areas are located. Also, during the tour, introduce the new employee to other staff members.
- Provide necessary keys to the new employee for the office, desk, etc.
- Ensure the new employee has a fully functioning computer and access.
- Complete an Employee Inventory Checklist, Dual Employment Form, Countywide Key Control Form and send copies to BHR for the new employee's file.
- Introduce the new employee to the person you have identified to provide phone and voicemail setup instructions.
- Introduce the new employee to the person you have identified to provide instructions on accessing outlook and the pertinent computer programs.
- Introduce the new employee to the person you have identified to provide instructions on how to access/use EBS Employee Self Service and Cook County Time (CCT).
- Confirm the new employee has received welcome email regarding benefits enrollment and is able to access employee self-service and the benefits module. New employees must enroll in benefits within 31 days of start date. Contact Risk Management as soon as possible if there are any issues or questions.
- Review office policies and procedures including:
 - Working hours
 - Telephone, email, and internet use
 - Office resources
 - Office organization (files, supplies, etc.)
 - Staff meetings
 - Accountability, Confidentiality, and Ethics
 - Department and/or building specific safety and emergency information
 - List of employees to meet during upcoming weeks
- Review department (or office's) purpose, organizational chart, and goals.
- Review Cook County's Mission, Vision, and Goals and discuss how your department supports them
- Give the employee their initial assignment (make it something small and doable).
- Debrief with employee after they attend initial meetings and trainings and begin working on initial assignment. Continue to touch base briefly each day.
- Review the job description and your expectations with the new employee, and how the job supports the department's goals.
- Explain the goal setting process.
- Review the process related to the probationary period, if appropriate.
- Clarify any performance expectations or policy questions.
- If the new employee is a supervisor, review list of direct reports with employee including duties and responsibilities of each direct reports
- Schedule and conduct regularly occurring one-on-one meetings.
- Discuss performance and professional development goals. Give the employee an additional assignment.
- Elicit feedback from the employee and be able to answer questions.
- Confirm required trainings have been completed.

Employee's First 30 Days

- If the employee is a supervisor, remind them to sign up for the additional training sessions Cook County Supervisors are required to attend.
- Continue to provide effective and meaningful feedback.

Additional Information

If your employee has questions about benefits, please then contact Risk Management 312-603-6385 or email risk.mgmt@cookcountyil.gov. If your employee has questions about how to enter time, please see the departmental timekeeper as a reference. BHR is here to help you and your new employee during this transition.

Contact the Cook County Bureau of Human Resources at 312-603-3300 or visit <https://www.cookcountyil.gov/agency/bureau-human-resources-0>

RESOURCES: Checklist for New Supervisors

A Checklist for new employees who have direct reports.

Review list of Direct Reports

Review the list of employees who you supervise noting:

- Employee's position.
- How long the employee has been employed at Cook County and in their current position?
- Employee's reporting office within Cook County.
- Duties/responsibilities of employee's position.
- Review of the Policy Library.

Setting Expectations

- Describe your leadership philosophy and clarify your availability for emergency and non-emergency situations.
- Build trust and credibility with your direct reports, but separate friendship from your position. Set and maintain clear boundaries.
- Learn more about the structure of your own department by asking your manager or appropriate departmental contact about the specifics of your department.

Supervisor Resources

- Sign up for additional training for Supervisors.
- Learn how to approve employees' timesheets by working with your assigned timekeeper.
- Review the payroll schedule for the current year.
- Review relevant Cook County policies in the online Policy Library.

RESOURCES: Welcome Email Templates

*These are sample emails and simply suggestions.
Please modify them as necessary to meet the needs of your department.*

Sample Welcome Email to New Employee from Department

Hello [Name],

This is a quick note to tell you our whole department is excited for you to start on [Hire Date]! Please be aware you will be attending New Employee Orientation on your first day with the County at the following address.

[Name of Office] [Address]
[City, State Zip]

A few things to know:

- Please familiarize yourself with the Personnel Rules, which you may access through the following link: <https://www.cookcountyil.gov/service/county-cook-personnel-rules>
- Let the new employee know of the expected attire. If you have any questions, please feel free to call or email me at [phone number] or [email address].

We will spend some time during the first week going over your training schedule and discussing any questions, you may have.

Again, we are so excited to have you join our team and become a part of the Cook County Government community! If you have any questions at all, please do not hesitate to reach out to me.

Sincerely,

[Supervisor Name]
[Title]

Sample Welcome Email to Department

Put some fun into this email. It is an easy way to make the informal announcement and introduction to your team. It provides a glimpse of their new team member and allows them to start building and connecting.

Dear Colleagues:

I am delighted to announce [First and Last Name] has accepted the position of [Title] in [Department Name], effective [Hire Date]. This position reports to [Name].

[First Name] will be responsible for [High Level Overview of Major Responsibilities].

[First Name] brings experience and a proven track record of success in the [Professional Field] area, which will be invaluable in meeting departmental goals and objectives.

I am confident [First Name] will be an excellent match for this position and a strong asset to the [Department/Team]. [First Name] will be located in [Building/Room #] and can be reached at [Extension] or [Email Address].

Please join me in welcoming [First Name] to [the Organization/Department].

Sincerely,

[Supervisor Name]
[Title]

Sample Email to Assist New Employee with Phone and Voicemail, Computer Setup, and Use of CCT

Hello [Name of Designee]:

As you know, [Name] will be joining our Department on [Day, Date] as [title/position]. I am writing to ask you to meet with [Name] on that day to guide them through the process of installing their phone and voice mail, setting up their computer, and ensuring all pertinent programs have been installed and are working properly. Additionally, please ensure they are enrolled in CCT, and show them how to access CCT via their computer or kiosk.

Please feel free to contact me if you have any questions.

Thank you for welcoming this new team member.

[Supervisor Name]
[Title]

RESOURCES: New Employee Workspace Checklist

Name: _____

Location of Workspace: _____

Start Date: _____

Clean the area: Please use the appropriate cleaning material for item you are cleaning.

- Clean the desk and wipe it down with disinfectant wipes.
- Clean out any drawers, shelves, cubbies, or other space provided to them.
- Wipe down the phone, computer, keyboard, mouse, tower, and printer.
- Clean Vehicle

Supplies: Check to ensure your new employee has the following supplies, if applicable.

- | | |
|---------------------------------------|--|
| <input type="checkbox"/> Pens | <input type="checkbox"/> Binder clips |
| <input type="checkbox"/> Pencils | <input type="checkbox"/> Paper clips |
| <input type="checkbox"/> Highlighters | <input type="checkbox"/> Staple remover |
| <input type="checkbox"/> Scissors | <input type="checkbox"/> Desk drawer organizer |
| <input type="checkbox"/> Calendar | <input type="checkbox"/> Folders |
| <input type="checkbox"/> Stapler | <input type="checkbox"/> Files |
| <input type="checkbox"/> Tape | <input type="checkbox"/> Note pads |
| <input type="checkbox"/> Thumb tacks | <input type="checkbox"/> Business cards |

Other supplies or programs needed

- | | |
|--------------------------------|--------------------------------|
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |
| <input type="checkbox"/> _____ | <input type="checkbox"/> _____ |

Notes

Supplies to order:

Issues with workspace:

RESOURCES: Setting Employee Expectations Guide

Setting employee expectations for performance and behavior is one of the most important conversations a supervisor will have with their employee. This conversation will let an employee know exactly what is expected of them in their position and will set a foundation for their performance.

General Expectations for all Employees

It is ideal to have the expectations created before an employee begins working in their position, however, expectations can really be created and presented at any time. In addition, if a supervisor has more than one employee, general office expectations can be created and distributed to all employees. This will keep expectations consistent with all employees and easier for the supervisor to manage.

Below is a list of ideas to include in your list of expectations for employees:

- Be on time for your scheduled shift.
- Plan for scheduled absences ahead of time. (Can include specific requirements for requesting time off and getting approval. Review the Time and Attendance Policy the employee received during New Employee Orientation).
- Provide BHR Employee Time and Attendance Policy and the Department Time and Attendance Policy, if applicable.
- Obtain approval from supervisor prior to working overtime or comp time.
- Dress appropriately for the workplace. (Can include specific office dress code).
- Maintain a positive, helpful attitude.
- Maintain confidentiality.
- Provide quality service.
- Treat others with dignity and respect always.
- Maintain the qualifications, certification, licensure, and/or training requirements identified for their positions.
- Support efforts that ensure a safe and healthy work environment.
- Enjoy your time at work!
- Perform all duties as assigned.

Specific Performance Goals for Individual Employees

Set specific goals tailored to the position and the employee. Start with a job description and develop goals and targets for employees to meet.

As a new employee settles into a position, these goals might have to be adjusted, but this will help provide guidance of what is expected. Be mindful to not set unreasonable goals; setting an employee up to fail will only lead to employee dissatisfaction and possibly turnover. Be realistic and set a few key goals for the first few months the employee is working.

Discuss Performance Frequently

Conversations about performance should happen often with employees. Supervisors should meet with employees on a regular basis. We recommend meeting once a week or every other week, but no less than once a month, depending on the needs of the employee and the office. During these One-on-One meetings, discuss progress of the performance goals to reiterate the expectations you have for the employee. These meetings will also help supervisors assess if the workload needs to be adjusted for the employee.

Individual meetings are a great way for supervisors to ask employees what they can do to help with meeting goals and show support for the work the employee is completing. These meetings also provide an opportunity for a supervisor to get to know their employee.

RESOURCES: Creating Goals for Your New Employee

A few things to remember:

- 1) Goals should be clear and easy to understand.
- 2) They should be obtainable in the time frame given.
- 3) Review them often with the employee.
- 4) Make changes and adjust as necessary.

Ask yourself the following questions:

- 1) How does this goal relate to my employee's job?
- 2) Will this goal provide opportunities for development?
- 3) Will the goal allow them to obtain new skills?
- 4) Will the goal impact their ability to do their regular work?

Design SMART Goals together with the <https://info.umkc.edu/hr/wp-content/uploads/2015/11/SMART-Goal-Setting-Tips.pdf> new employee. Remember goals are fluid and change is okay. Goals should be discussed and revised based on the needs and performance of the new employee.

Specific Measurable Attainable Relevant Timely

Specific goals: Define specific results and provide concrete details on what is to be achieved.

- What do you want the employee to accomplish? Why?
- What are the requirements?
- What are the constraints?

Measurable goals: Define how success will be measured.

- How will you measure your employee's progress?
- How will you know when the goal is accomplished?

Attainable goals: Goals are challenging and go beyond day-to-day duties using resources available.

- How can the goal be accomplished?
- What are the steps the employee should take?

Relevant goals: Goals are focused on what is to be accomplished in a broader context.

- Is this a worthwhile goal?
- Is this the right time for this goal?

Timely goals: Goals are committed to a deadline, which helps focus efforts on completion of the goal.

- How long will it take to accomplish the goal?
- What is the due date?
- When is the employee going to work on this goal?

Examples of 30- and 90-Day Goals

Goal: Identify ways to reduce customer wait time from 8 minutes to 5 minutes.

Expected time to complete: Discuss at the end of your first 30 days.

Goal: Improve customer satisfaction scores by 5%.

Expected time to complete: Create and implement plan by end of 90 days.

Goals Worksheet

We have created a blank Goals Worksheet to assist in writing goals for the new employee. It is recommended you have a few goals established for the employee to begin working on during their first few weeks of employment. Make the first few goals simple to complete to set the employee up for success in their new role, and gradually increase the complexity of the goals as the employee progresses in their position.

RESOURCES: SMART Goals Worksheet

First Week

Goal: _____

Expected time to complete: _____

Goal: _____

Expected time to complete: _____

30 Days

Goal: _____

Expected time to complete: _____

Goal: _____

Expected time to complete: _____

90 Days

Goal: _____

Expected time to complete: _____

Goal: _____

Expected time to complete: _____

New Employee Checklist

WELCOME TO COOK COUNTY GOVERNMENT!

Contact the Cook County Bureau of Human Resources at 312-603-3300 for any questions related to onboarding unless otherwise noted for specific areas.

Employment Information

This section is to help you keep track of all the important information for your new position.

Employee: _____ Position: _____

Department: _____ Supervisor: _____

Start Date: _____ Orientation Date: _____

The information below will be provided when you complete your onboarding paperwork.

Employee ID: _____ Single Sign On (SSO): _____

Employee Email (email = firstname.lastname@cookcountyil.gov): _____

Password: You will create your password for your Cook County SSO during your first week in the Department. Be sure to remember this password, as it will be used to access all information regarding your employment, your employee email, and much more.

Start Date

- Attend New Employee Orientation
 - Orientation begins at 8:30 a.m. Please arrive 15 minutes early. The location will be included in the NEO invite, sent by the end of the day on the Friday before your NEO session.
- Please refer to Employee Self-Service to view and input important information including but not limited to:
 - Emergency Contact information
 - Dependent Information
 - Tax Withholding
 - Elect and Enroll in Employee Benefits
 - Print Pay Stubs

During Your First Week

- Review your workspace and make sure you have adequate materials for work.
- Clarify any performance expectations or policy questions you may have with your supervisor or BHR. Things you might discuss include:
 - Breaks/Lunch
 - Overtime/Comp Time
 - Process for Requesting Time Off (Vacation/Personal/Sick)
 - Performance expectations
- Review Cook County's Mission, Vision, Goals and Policy Roadmap

If you supervise employees, view and print the Checklist for New Supervisors. (See Checklist for New Supervisors)

During Your First 30 Days

- If benefits eligible, complete benefits enrollment within 31 days of your start date. For assistance with benefits enrollment, please contact Risk Management 312-603-6385 or email risk.mgmt@cookcountyil.gov

Additional Information

A BHR representative is here to help you with any other questions you may have.

Contact the Cook County Bureau of Human Resources at 312-603-3300 or visit <https://www.cookcountyil.gov/agency/bureau-human-resources-0>

RESOURCES: Definitions

For purposes of this Onboarding Resource Guide, the following terms shall be given the meanings as set forth below:

Background Check: the process of compiling confidential and public information to investigate a Candidate's criminal history and confirm information given. (see Background Check Policy).

BHR: Bureau of Human Resources at Cook County Government.

BHR Workforce Strategy Division: A BHR division charged with Recruitment and Selections and the Classification and Compensation for OUP.

BOT ("Bureau of Technology") Resources: BOT owned or managed assets and information, including, but not limited to, computers, telephones, photocopiers, scanners, storage devices, network routers, software, email, computer program files, VPN access, data, images, instant messaging, telephone call records, text messaging, voicemails, computer log files, database access credentials, read-and-write access to the County's Marketplace and the authority to issue purchase orders to BOT vendors.

Bureau: See Department.

Candidate: An Applicant whose name is included on the Interview List pursuant to Section V. of the Cook County Employment Plan.

Cook County Time System or CCT System is the County's time and attendance system to which employees gain access through Time Clocks, an IVR Clock, or the web-based Dashboard.

County: The County of Cook, Illinois.

DBMS: Department of Budget and Management Services.

Department: A unit of the County, including, but not limited to a bureau, operating unit, or department.

Department Head: The individual assigned to head or direct a Department.

EBS Oracle System: Enterprise Business Suite used by Cook County employees.

Emergency: A situation which has been certified, pursuant to Section VII.A of the Cook County Employment Plan, involving a significant threat to public safety or health (e.g., a natural disaster, a weather-related event, a terrorist attack or similar event), but not including budgetary or financially caused situations (e.g., a hiring freeze, a grant application deadline or similar event).

Employee Self-Service: Platform in EBS Oracle System providing employees the ability to enter personal information, emergency contact information, dependent information, tax withholdings, and elect and enroll in County benefits.

Employment Plan: A court-mandated order that sets forth general principles that govern the County's hiring and employment policies and procedures and prohibits political discrimination. The Employment Plan applies to current employees of the County as well as all Applicants and Candidates of the County. Except as specifically provided herein, the Employment Plan does not apply to any Employment Action concerning employees holding Exempt Positions. (Cook County Employment Plan).

Exempt Position: A County employment position included on the Exempt List and is a job that involves policymaking to an extent or is confidential in such a way that political affiliation is an appropriate consideration for the effective performance of the job.

Grant of Authority: The form signed by the BHR Chief Human Resources Officer or their designee granting authority for employment.

Hiring Department: The Department to which an Applicant is assigned to work upon being hired by the County.

Hiring Packet: The Hiring Packet begins the processing of an employee's application and contains documents, including but not limited to, Decision to Hire Form, Request to Hire, Requisition Form, Offer Letter, Checklist for Processing County Employees Under the President Office form, signed Grant of Authority form, Job Application, Job Description, Candidate's Resume, Personnel Action Form and any certifications or licensure required for the position.

Job Description: The written job description that describes the Minimum Qualifications and current responsibilities of a position and the knowledge, skills, abilities, and education needed to perform those responsibilities.

Onboarding: The process of integrating a new employee at Cook County in Bureaus and Departments under the jurisdiction of the Cook County Board President to enable the employee to succeed in their position.

Offboarding: The process of consciously separating an employee from a Cook County Bureau or Department under the jurisdiction of the Cook County Board President either through voluntary resignation, layoffs, or termination.

OUP: Offices under the jurisdiction of the Cook County Board President.

Position: A group of duties and responsibilities assigned or delegated by competent authority, requiring the full-time or part-time employment of one person.

Supervisor: Any employee of the County who, among other managerial duties, has the authority to authorize, execute, or recommend any Employment Action.