Manager’s Toolkit

- Getting Started
- Manager’s Toolkit
- Along the Way
- End of the Road
- Detours
Welcome to the Department of University Human Resources at Oakland University. Our mission is to cultivate an environment where human endeavor flourishes. We commit to providing high quality, cost effective and timely services, information and guidance in the areas of employee relations, labor relations, employment, benefits, salary administration, personnel records and staff development in support of the university’s mission and goals and to meet or exceed related expectations of the Board of Trustees, university administration, university employees, applicants and other potential employees and outside companies and agencies with whom the department interacts.

We hope this site will provide the information you need. If you have any questions, please contact us at uhroakland.edu.

Click the image to check out the most recent UHR eNewsletter!
Managers' Toolkit

Regardless of your title, and whether you are a new supervisor or a seasoned veteran, if you supervise employees, this site is designed for you. From the section titled Getting Started where you will find information on the development of a position to the section End of the Road which includes a Separation Checklist, the Manager's Toolkit has everything you will need for the life cycle of your employee.

You are accountable for the employees whom you supervise and/or manage. Take advantage of management training opportunities offered. Stay current with University Administrative Policies and Procedures and the information within this site.

Click on document titles for pdf version. Click the ♦ to access the audio version where available.
Manager’s Toolkit

GETTING STARTED
First things first! One of the most important decisions a manager will make is to hire the right person for the right position. The Getting Started section of the Manager’s Toolkit will direct you in developing, recruiting, and hiring for a new position. There are many helpful road maps to guide you through the process and get your new employee on the road to success.

Some files are also available as an audio presentation. Click the to access the audio version.

Developing
- TEAMS - Establishing a new position description
- TEAMS - Modify/reclassify an existing position description
- Developing selection criteria
- Posting specific questions
- TEAMS - Creating an employment requisition

Recruiting
- Policy 725 - Filling vacancies (excluding academic)
- Policy 704 - Internal promotions and transfers
- TEAMS - Hiring supervisor's steps in the hiring process
- Recruitment and advertising
- Tips on recruiting a diverse staff
- MI HERC
- Screening applicants
- Pre-employment inquiry guide
- Interview preparation outline
- Suggested interview styles and questions

Hiring
- TEAMS - Creating an employment requisition for temporary or casual positions
- Policy 770 - Temporary and casual employees
- Applicant's authorization to release information
- Reference checks
- TEAMS - Completing the selection criteria grading form
- Background checks
- Salary determination and approval
- Offers of employment
- Employee benefit summaries
- New hire checklist
- VP and Admin. Head checklist

STOP
Before you begin the process of filling a position, be sure you have taken the steps necessary to terminate the previous incumbent. Click here for the End of the Road - Separation Checklist.
Manager’s Toolkit

Developing

- TEAMS – Establishing a new position description
- TEAMS- Modify/reclassify an existing position description
- Developing selection criteria
- Posting specific questions
- TEAMS – Creating an employment requisition

TOTAL EMPLOYEE AND MANAGEMENT SOURCE

ESTABLISHING A NEW POSITION DESCRIPTION

Position descriptions for all regular positions are maintained in the TEAMS System. Careful attention must be given to establishment of the qualifications and job duties, including percentages as this information ties directly to the employee’s performance evaluation and the annual Performance Management Process.

Additionally, hiring tools such as the selection criteria and the posting specific questions must be established as part of the position description. All information in the position description carries forward into the requisition for recruitment and filling of the position.

Hiring Review Committee

New positions or reorganizations of two or more positions must be approved by the Hiring Review Committee prior to beginning this process. To accomplish this you must state your business case in an email to your supervisor. The email should include the following:

- Proposed title of position(s)
- Estimated band or level – you may view other positions in the system selecting those which may be similar. Contact the Benefits, Compensation and HRIS Office for additional details.
- Approximate salary
- Funding source
- Reason for the new position or reorganization

Your supervisor will forward their support on to the next level and eventually to the Vice President who will present this request to the Hiring Review Committee. Once approved you may begin to establish the new position in the TEAMS system.
SOME TIPS ON RECRUITING A DIVERSE STAFF/FACULTY

A vacancy presents an opportunity for the university to re-think a position and the type of person needed now and in the future. The position should reflect support of the institution’s mission and strategy and pervade all of your thinking about the attraction and selection of talent.

Preparation

1. Delay filling positions until you have had an opportunity to carefully analyze your programmatic needs and develop an up-to-date job description. This promotes long-range planning and counters the tendency of current department members to simply clone themselves and others.

2. Start thinking a bit like an athletic coach. Coaches go out and find the talent they need. They don’t put ads in the paper and then sit back and wait.

3. Tell people about the great things going on at OU. Our success ranges from new partnerships formed in various disciplines to ground breaking research to new initiatives in staff areas.

4. Always be in a recruitment mode – do not wait for searches to announce vacancies. This means keeping an eye out inside and outside the University for potential staff members of color and women. Establish friendly relationships with them so that if you call and ask them to be a candidate for an open position they’ll be likely to agree.

5. Have women and people of color on search committees. If that is absolutely impossible, assign the role of affirmative action liaison to one of the committee members.

6. Discuss hiring goals with your Employment Representative prior to any hiring or recruiting activity. The profile of the department, the availability figures for women and people of color, and any affirmative action goals should be reviewed and understood by all members of the committee.

7. Emphasize results as well as process; be positive rather than defensive and negative; aggressive and visible rather than passive and bureaucratic, flexible and
Manager’s Toolkit

New Employee Checklist

This checklist is designed to assist the supervisor’s efforts in providing each employee with the information and resources they need to be successful. The items on this list do not need to be completed in the order presented. Please keep this information in your file.

Employee Name _____________________________ Hire Date _____________________________

<table>
<thead>
<tr>
<th>Initial and Date On Completion</th>
<th>Before Arrival</th>
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<tbody>
<tr>
<td></td>
<td>Notify staff of new employee’s impending arrival</td>
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<tr>
<td></td>
<td>Notify department of new employee</td>
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<tr>
<td></td>
<td>Contact EHSS (x 7580) to review OSHA training requirements if your employee will be working in one of the following areas: Service Maintenance, Grounds, Project Management, Golf Course, University Services</td>
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<tr>
<td></td>
<td>Assign and prepare work space</td>
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<td></td>
<td>Assign/Order furniture</td>
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<td></td>
<td>Assign computer</td>
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<td></td>
<td>Conduct hardware/software inventory</td>
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<tr>
<td></td>
<td>Assign telephone and extension</td>
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<tr>
<td></td>
<td>Create relocation box</td>
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<tr>
<td></td>
<td>Change voicemail directory</td>
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<tr>
<td></td>
<td>Change phone display, if applicable</td>
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<tr>
<td></td>
<td>Assign mentor(s), if applicable</td>
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<tr>
<td></td>
<td>Assign training, if applicable</td>
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<tr>
<td></td>
<td>Arrange for and organize training program for employee</td>
</tr>
<tr>
<td></td>
<td>Order desk supplies (calendars, pads, etc.)</td>
</tr>
<tr>
<td></td>
<td>Make arrangements to obtain keys (building, filing, desk, etc.)</td>
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<tr>
<td></td>
<td>Notify mail room by fax 2068 of new employee</td>
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<tr>
<td></td>
<td>Order name badge and name plate, if applicable</td>
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<tr>
<td></td>
<td>Review appropriate attire for work</td>
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<tr>
<td></td>
<td>Please complete each item in the sequence presented:</td>
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<tr>
<td></td>
<td>Ensure that employee has completed all paperwork with UHR and has received a benefits packet</td>
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<tr>
<td></td>
<td>Verify that employee record has been entered into Banner</td>
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<tr>
<td></td>
<td>Remind employee to complete e-mail request on line by doing the following:</td>
</tr>
<tr>
<td></td>
<td>Get SAIL ID and PIN</td>
</tr>
<tr>
<td></td>
<td>Login to SAIL and change PIN</td>
</tr>
<tr>
<td></td>
<td>Go to E-mail page to log in and obtain e-mail ID and password</td>
</tr>
<tr>
<td></td>
<td>Complete and sign Account Request form (AMRNET, Banner, also access to vacation time calendar, if applicable or other departmental systems)</td>
</tr>
<tr>
<td></td>
<td>Review user access rules (FERPA)</td>
</tr>
<tr>
<td></td>
<td>Complete and sign Banner Access Request form</td>
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<td></td>
<td>Review Mobile computing Guidelines, Policy 85x, specifically <a href="http://www2.oakland.edu/audit/SECTION%2085X%20INFORMATION%20TECHNOLOGY">http://www2.oakland.edu/audit/SECTION%2085X%20INFORMATION%20TECHNOLOGY</a></td>
</tr>
<tr>
<td></td>
<td>Obtain OUID Smartcard at Oakland Center near President’s lounge</td>
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<td></td>
<td>Instruct employee to create an online calendar using Google calendar. See instructions at <a href="http://www2.oakland.edu/ucp">http://www2.oakland.edu/ucp</a></td>
</tr>
</tbody>
</table>

Orienting New Employees

Employees who have been properly oriented to their work environment experience greater satisfaction and success. Increasing one’s familiarity with new surroundings and expectations provides a welcoming impression and leads to greater productivity sooner.

As you prepare for and orient a new employee to your work area, the attached Employee Checklist serves as a guide to ensure that you have covered essential items. Blank spaces have been added to each section to allow you to customize this checklist to suit your needs.

Please ensure that the information contained in the Employee Checklist (and additional items pertinent to your area) is covered. A team approach may work best, with some items being covered by the supervisor and others covered by others in the department.

UHR will be following up with you and the new employee at intervals during the first year to assure that a smooth transition to OU and to your work area has taken place.
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ALONG THE WAY

Enriching the career path is an important factor for all employees. To help keep things smooth sailing the Along the Way section will help you navigate the twists and turns and offer opportunities to Maintain, Train and Sustain the employee throughout the journey.

Click on document titles for pdf version. Click the icon to access the audio version where available.

Maintain
- Administrative Policies and Procedures
- Employee Manuals and Contracts
- Performance Management for Non-bargained employees
- Performance Review Process for MEA/NEA employees
- Status Changes
- Position Changes
- Compensation

Train
- UHR Training
- SkillSoft Online Courseware
- Sexual Harassment Training
- Leave/time reporting
- Career Development

Sustain
- OUPD
- Employee Health and Safety
- Emergency Preparedness
- Recognition
- Wellness
Manager’s Toolkit

Maintain
- Administrative Policies and Procedures
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- Compensation

OUPSA
(Oakland University Professional Support Association)

OUCMT
(Oakland University Campus Maintenance & Trades)

POAM
(Police Officers Association of Michigan)

POLC
(Police Officers Labor Council)

Administrative Professional Personnel

Confidential Assistant Personnel

Use of University Information Technology Resources:
- Use of University Information Technology Resources

Drug Free Workplace Guide:
- Drug Free Guide
Manager’s Toolkit

Train
- UHR Training
- SkillSoft Online Courseware
- Sexual Harassment Training
- Leave/time reporting
- Career Development

OU Home > Faculty and Staff Training > SkillSoft Online Training

SkillSoft Online Training
Building and sustaining a high-performance culture within Oakland University requires an investment in the personal and professional development of its workforce. University Human Resources is committed to providing quality personal and professional development opportunities to support faculty, staff and administrators in their pursuit of career growth and professional excellence. Everyone is encouraged to take advantage of the numerous and varied learning opportunities that are available, including online learning.

SkillSoft provides a vehicle to build skills and knowledge, and enhance strengths gained from experience or education. Faculty, staff and administrators have access to a library of approximately 1500 courses, which can be taken via the Internet from any computer, at any location with Internet access, any time of day or night. There are three primary curricula for selection:

- Business Skills Curriculum include topics such as management and leadership, written and verbal communication skills for personal and professional effectiveness, and customer service skills;
- Desktop Curriculum offers courses on Microsoft Office applications, internet browsers, and Adobe programs;
- IT professionals can select from Oracle database courses and project management skills. SkillSoft courses are easy to navigate and the learner is actively engaged through audio, case studies, animation and the ability to print handouts for reference. Pre- and post-tests provide an opportunity to demonstrate proficiency.

A bookmarking feature allows learners to move in and out of courses based on the learner’s schedule and needs. One section of material can be completed in as little as 15 minutes. Learners can refresh or update themselves on various sub-topics within a course or select entire courses to enhance proficiency. To make the best use of time, learners may “test out” of topics within a course in which they can demonstrate proficiency by taking a pre-test. The course content automatically adjusts to cover only the information the learner needs.

Learners can print certificates of completion on courses in which they have earned an 80 or higher.

All Oakland University faculty and staff are eligible for this training tool.

New users: Click here to request your account on SkillSoft.

Returning users: Click here to sign into SkillSoft.
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Employee Recognition

- Years of Service
- Recognition at OU
- Employee of the Month
- Outstanding Administrative Professional

Sustain
- OUPD
- Employee Health and Safety
- Emergency Preparedness
- Recognition
- Wellness
Manager’s Toolkit

Employee of the Month

Do you know an employee who:

- **Shines by Their Attitude:** Has a positive attitude and performance in serving the needs of the university staff from other department, students, visitors, faculty, etc.
- **Reaches Higher:** Dedication and work ethic that is above and beyond that required.
- **Performs Exceptionally:** Proven and demonstrated methods of improving the efficiency of the workplace: exceptional performance in a project or task, which results in a saving of money/time, or increases revenues, productivity and/or morale.
- **Promotes Teamwork:** Builds positive working relationships with individuals and with teams on cross-functional projects.
- **Rallies in Support of OU:** Aligns their work in support of Institutional Priorities.

Describe how your candidate has demonstrated at least three of the standards listed above.

**Note:** All fields are required

<table>
<thead>
<tr>
<th>Your Name:</th>
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<tbody>
<tr>
<td>Your Phone:</td>
</tr>
<tr>
<td>Your Email:</td>
</tr>
<tr>
<td>Nominee’s Name:</td>
</tr>
<tr>
<td>Nominee’s Position:</td>
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<tr>
<td>Nominee’s Department</td>
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<tr>
<td>Nominee’s Supervisor</td>
</tr>
</tbody>
</table>

Comments in 200 words or less
Manager’s Toolkit

Years of Service Awards Recipients 2011

40 Years of Service
Barry Winkler

30 Years of Service
Hoda Abdel-Aty-Zohdy
Linda Barc
Daryl Gouin
Veronica Lavallais
Barbara McDowall
Gary Moore
Luellen Ramey
Christian Wagner

20 Years of Service
Lettie Alston
Susan Awbrey
Maria Bryant
David Garfinkle
Nan Gelman
Sarah Gibson
Stacey Hahn
Niels Herold
Ravindra Khattree
Estela Moreno-Mazzoli
Theophilus Ogunyemi
Mohinder Parkash
Gregory Patterson
Phyllis Rooney
Kristie Schult
Karen Sheridan
Andrei Slavin
Martha Zingo

10 Years of Service
David Archbold
Patricia Becker
Catherine Berrahou
Karen Bolak
Shravan Chintala
Patricia Clark
Scott Crablen
Karen Dunn
Maria Ebner-Smith
Shelly Garretson
Stacy Garza
Darrin Hanna
Cora Hanson
Jennifer Harp
Heather Haughey
Jennifer Heisler
Michael Hill
Alvin Johnson
Lori Jones
Pamela Kellett
Shailesh Lal
Theresa Landry
Debra Lashbrook
Manager’s Toolkit

DETOURS

Even in the best of circumstances there will be bumps in the road which may cause an employee to take a detour. This section will guide the manager on handling leaves, employee issues, and other incidents when the road gets bumpy.

Leaves of Absence
- FMLA (Family Medical Leave Act)
- Disability
- Form

Labor and Employee Relations
- Labor/Employee Relations
- Bargaining Unit Employees
- Non-Represented Employees
- Employee Counseling Connection
- Harassment/Discrimination

Incidents and Accidents
- Accident/Injury Reporting Form
- Workers Compensation Forms

How to Report a Disability Claim and/or Family Medical Leave (FML) Under Oakland University’s Group Disability Plan

It's easy! Call CIIGA's toll-free number at 1-888-64-CIGNA or 1-888-442-4482 and a knowledgeable CIIGA Video Specialist will walk you through the process. For Spanish speaking customers, call 1-888-502-4421.
You can also create a new leave request via www.myCIGNA.com by following the registration instructions.

When do I call?
- Call CIIGA as soon as you know you will be absent for any of the following reasons:
  - Disability - If you are expected to be absent from work for more than 30 consecutive days due to your own disability.
  - Family Medical Leave - If you have a serious health condition that makes you unable to perform the functions of your job and expect to be absent from work for 12 months.

OU Home > University Human Resources > Managers’ Toolkit > DETOURS > Non-Represented Employees

Non-Represented Employees

The Administrative Professional Personnel Policy Manual provides comprehensive policies and procedures for non-represented exempt staff.

The Confidential Assistant Personnel Policy Manual provides comprehensive policies and procedures for non-represented non-exempt staff.

Please click on the images below to access the manuals.
END OF THE ROAD

When the employee reaches the end of the road and they are ready to journey into a new future, there are several things the manager must do to finalize this employment. The Separation Checklist and following policies will be useful tools in bringing this journey to an end.

**Separation Checklist for Managers**
Checklist for managers on tasks to be completed in the event of a termination

**Acknowledgments**
- Policy on business expenses (receptions)
- Funeral tributes policy
- Memorial grove policy
Manager’s Toolkit

Separation Checklist

This checklist is designed to assist the supervisor and the employee during the period of separation from the University or the department. The checklist must be completed in the event of a resignation, involuntary termination, retirement, leave of absence, or when an employee transfers to a different department.

Employee Name

Separation Date

Please complete the items below, marking completion and noting the date for each.

Done Date

Upon Notice

1. Obtain resignation letter
2. Notify UHR Personnel Records (x3482) of employee termination
3. Complete Termination/ Leave of Absence & Return/ Layoff & Return form and send to UHR immediately, to avoid overpayment.
4. Inform employee to contact UHR Employment Services (x3480) to schedule an exit interview
5. Inform employee to reconcile vacation balances with UHR Personnel Records (x3482)
6. Inform employee that UHR Staff Benefits will contact him/her regarding continuation of benefits
7. Begin hiring process by preparing online requisition. If position is no longer active or will not be posted within 30 days, notify UHR Employment Services (x3480)
8. Reconcile outstanding department expenses (travel, mileage, etc.) and inform employee to reconcile other debts to the University (library fines, tuition reimbursement, etc.)

Last Day

1. Inform employee to provide forwarding address to UHR Personnel Records (x3482), if applicable.
2. Ensure that OU property/equipment has been returned:
   - Keys (building, filing, desk)
   - Access Cards (Laboratory/ Facility)
   - Photo ID/ Badges
   - Uniforms
   - Computers/ Laptops
   - Cell Phones/ Pagers
   - Purchasing Card
   - Reference/ Training/ Project Manuals
   - Other Proprietary Materials
3. Change voicemail directory, vm box, and phone display; ask employee for vm access code
4. Unsubscribe employee from mailing lists; make provisions for access to work-related email addresses
5. Update department organization chart/ website. Notify UHR Personnel Records (x3482) of changes in reporting authority
6. Change secure access codes
7. Notify departments to remove employee’s signature authority (i.e. Payroll, Accounts Payable, etc.)
8. Collect completed time card from employee
9. Ensure that employee has cleaned computer files, removing personal items and transferring University files to a location that is accessible to others
10. Ensure that the employee has removed personal items
11. If employee is on H-1B visa status, notify UHR Employment Services (x-3480) to ensure compliance with special requirements
Questions

Getting Started

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End of the Road

Along the Way

Detours

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