Onboarding Process

Outline for New Employees

An interactive checklist for new Extension Employees to become familiar with roles, responsibilities, and resources which will be helpful during the first year and throughout a career with Ohio State University Extension.

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THE OHIO STATE UNIVERSITY
EXTENSION

College of Food, Agricultural, and Environmental Sciences
Extension Operations
extension.osu.edu/operations

Onboarding Process Outline for New Employees

Introduction

Welcome to Ohio State University Extension! We are excited to have you as part of the team! The information which follows is designed to serve as your roadmap for your first year on the job and continue to serve as a resource for years to come. If you have any questions regardingyour role, responsibilities, or expectations, consult your supervisor.

Congratulations on your decision to join Ohio State University Extension! Here's what you can expect in the next few days and weeks:

- ☐ **Receive periodic correspondence from Supervisor or HR**
- ☐ **Review OSU Benefits Options**
  - **Health, retirement, dental, vision, life, disability**
  - **Your Plan for Health Information**
- ☐ **Receive an email from OTDI with instructions to Activate OSU identity**
  - **Name.# and set password**
- ☐ **Browse OSU Extension Websites**
  - **County Extension Websites are all *countyname.osu.edu***
- ☐ **Have a conversation with your supervisor regarding schedule with clear expectations for the first two weeks.**

Supervisor Snapshot:
Make sure you communicate schedule expectations for at least the first 2 weeks!

Day 1:

On-Demand New Employee Orientation
In July 2025, Ohio State introduced a self-paced, on-demand orientation for campus staff. This format offers consistent content delivery, greater schedule flexibility and fewer first-day technology barriers. A three-module course, *New Buckeye Orientation: Becoming an Ohio State Employee,* will be automatically assigned in BuckeyeLearn on each new staff member's first day. It also includes a new Employee Orientation Guide, as well as an Employee Orientation Companion Guide for hiring managers.

What an exciting opportunity to meet the team! Here are some items you can expect to accomplish:

- ☐ **A unit welcome (e.g., shared meal, small gathering)**
- ☐ **Tour your local office and receive important items**
  - **Personal workspace**
  - **Keys to building**
  - **Security codes (if applicable)**
  - **Copier codes (if applicable)**
  - **Parking and Facilities information**
  - **Technology and Equipment Usage**
  - **Lunch/Breaks and Break room**
  - **Office Hours**
- ☐ **Review Phone System**
  - **Review TEAMS Calling/phones**
  - **Office staff direct lines**
- ☐ **Get assistance with university email or any other technology issues, contact the Ohio State IT Help Desk, which offers 24/7 support. Start by visiting: https://it.osu.edu/help**
  - **IT Representative** _____
- ☐ **Create your email signature**
- ☐ **Access to technology resources and support (my.osu.edu, BuckeyePass/Duo, Institutional Data Policy, wireless, Microsoft 365, Compass)**

Supervisor Snapshot:
Touch base on the first day. A well wish is a warm welcome!

Day 2:

- ☐ Make benefits selections (between now and your 30th day)
- ☐ Manage your personal information in Workday
- ☐ Time Entry (review in Workday where your time is entered)
  - Vacation
  - Sick Time
  - Leave
- ☐ Understand what to expect in the coming weeks
  - Review your job description
  - Highlight primary goals for the first three months
- ☐ Familiarize yourself with your office space and supplies
- ☐ Meet and connect with colleagues in your office
  - Office policies, norms and expectations
  - Learn office communication management
  - How to address walk-ins.
  - Discuss the expectations of colleagues in the office and division of responsibilities
  - Locate resources (FAQ's list of how to address common inquiries)
  - Communication of Schedules (Outlook Calendar Sharing or Other Methods)
  - Emergency contact information, how to report an absence, etc.
- ☐ Familiarize yourself with the basics of your computer system – and get the appropriate access to shared drives (OneDrive, Teams) etc.
- ☐ Get on appropriate email listservs
  - New employees are automatically added to the all-Extension and Extension-misc listserv
  - 4-H Professionals (4HProfessionals@lists.osu.edu contact Sarah Longo, longo.79@osu.edu)
    - Gain access to Ohio 4-H Intranet (Sarah Longo.79)
  - Community Development (Contact Sarah Mays, mays.201@osu.edu for Outlook group if needed)
  - FCS
    - FCS-Prof is for everyone associated with FCS (program assistants, educators, support staff, etc.) (FCS-Prof@lists.service.ohio-state.edu)
    - FCS-Educators is for field specialists, program specialists, state specialists, and educators (FCS-Educators@lists.service.ohio-state.edu)
    - FCS-PAT is for field specialists, program specialists, state specialists,and FCS admin (FCS-PAT@lists.service.ohio-state.edu)
    - Contact for above listservs is Thallia Blight blight.3@osu.edu

- **ANR**
  - **Contact Teresa Funk funk.67@osu.edu all-agnr@lists.osu.edu**
  - **Also, the ENLT Team listserv: enlt-team@lists.service.ohio-state.edu, which is geared toward members of the team, but sometimes it is used to reach out to a member of the team.**
  - **http://u.osu.edu/agnr/home/ our webpage for OSUE ANR TeamMembers & internal folks that need to find info.**
- **EFNEP**
  - **EFNEP (Expanded Food Nutrition Education Program) (PA's,Coordinators, Directors, and Etc.) efnepstaff@lists.osu.edu**
  - **Contacts: Alaina Niebauer, niebauer.6@osu.edu PC for EFNEP**

☐ **Request to be added to pertinent applicable Microsoft Teams**

☐ **Understand the financial structure of Extension in relation to your unit (federal, state, county, and grants).**
- **Funding sources**
- **Expectations (e.g., need to generate cost recovery vs. availability of funds)**

Supervisor Snapshot:
- *Review job description*
- *Highlight primary goals for the first few months*
- *Provide an FAQ list of common inquiries regard office policies*
- *Review Funding Sources and Expectations*
- *Review parking options for local and campus parking*

First Week:

During your first week, you should meet with your area leader to build knowledge of internal processes and performance expectations. This is also a great time to engage with your new team members. Also, continue to work on the onboarding items assigned to you in Workday and BuckeyeLearn.

Benefits Webinars in the first week
Having the information needed to make informed choices as it relates to available retirement and health and welfare benefits is essential. Encourage your new employee to attend the New Hire Retirement and Health & Welfare Benefits webinar offered every Monday from 12:30 – 3 p.m. except for holidays. Registration in BuckeyeLearn is recommended but not required.

Learn more about both webinars as you plan your new employee's schedule.

In addition to On-Demand New Employee Orientation, you will have the opportunity to participate in O.N.E. Extension (Onboard. Network. Excel). Sample agenda of topics covered include:

- **Introduction to OSU Extension and organizational values**
- **CliftonStrengths assessment**
- **Expectations of Extension professionals**
- **Networking and relationship building**
- **Extension tools and resources**
- **Teaching tools**

Contact Diane Mashburn.10 or ShaLise Simmons.761 for more information. This orientation is offered every six months.

MINE Program (Mentor. Impact. Network. Excel)
Learning and Organizational Development (LOD) offers this program which provides opportunities to connect with experienced mentors, peers, and resources within the university. Mentors will guide mentees through discussion and reflection, while equipping them with the tools and characteristics to be successful and happy in OSU Extension. MINE program mentoring overview.

Contact Diane Mashburn.10 or ShaLise Simmons.761 to be assigned a mentor.

As you move through the rest of your first week, the list below will serve as a good checklist of things to do, places to go, questions to ask, and information to find:

- ☐ **Discuss office culture, informal rules, and norms with your area leader**
  - **Observe others in your office (if applicable)**

- ☐ **Understand Worktags/FDM info (Cost Center, Balancing Unit, Fund, etc.) and how and when to use them**
- ☐ **Search BuckeyeLearn for the following trainings (check with your Area Leader to see if this applies to you):**
    - **Institutional Data Policy Training 2025**
    - **Fiscal Stewardship for All**
    - **Preventing Fraud**

Once completed, email Jesse Buxton.26 (Extension County Fiscal Officer) to gain additional access in Workday needed for your position.

- ☐ **Microsoft Teams**
    - **_____ (Name of County) County Extension**
- ☐ **Learn work processes related to:**
    - **Travel https://busfin.osu.edu/buy-schedule-travel/travel**
        - **https://extops.cfaes.ohio-state.edu/extension-finance/job-aids**
        - **Create Spend Authorization for Mileage for general office**
    - **Paid leave (sick and vacation) Workday - Absence**
    - **Purchasing in Workday https://busfin.osu.edu/purchasing**
    - **Get to know the Operations Team and the contact person in your Area for all your Fiscal questions/job aids and Administrative questions/and job aids**
    - **Administrative Resource Center (ARC) a complete library of all available guides for Workday, OneDrive, Teams, etc.**
- ☐ **Social media/website management for office**
    - **Gain access to platform(s) Facebook, Twitter, etc. (If applicable)**
    - **Schedule/Participate in appropriate trainings (i.e.: Drupal Training for website). Contact Cheryl Buck.19 for access to website once training is completed.**
    - **Review Ohio State and CFAES social media guidelines at https://brand.cfaes.ohio-state.edu/guidelines/social-media-guidelines/guidelines**
- ☐ **Become familiar with office procedures and practices**
    - **Work hours/overtime**
    - **Emergency management plan**
    - **Shared appliances/office equipment**

Second Week:

- ☐ **Become familiar with your geographical area**
  - **Locate places like banks, shopping, important offices/facilities (i.e. – camp,fairgrounds, community resources)**
- ☐ **Discuss with your supervisor if business cards are applicable**
- ☐ **Discuss performance management process with your supervisor**
- ☐ **Review guidelines for using personal devices for work**
- ☐ **Extension Branding**
  - **You will receive an email from Marissa Mullett.50 with a list of Adobe Express trainings (you'll need your Ohio State credentials to log in).**
- ☐ **THIS IS FOR 4-H RELATED POSITIONS ONLY. 4-H online login here: https://v2.4honline.com/#/user/sign-in (hit reset password and use Ohio State University email)**
  - **Sarah Carpenter carpenter.955@osu.edu; email Sarah for her to give manager access in 4-H online.**
- ☐ **Financials:**
  - **Contact Jesse Buxton (Fiscal Officer, Operations) 330-202-3558 buxton.26@osu.edu**
  - **Fiscal Coordinators:**
    - **Dawnn Brown; 614-292-3510; brown.1283**
    - **Ingrid Twist-Hamilton; 234-220-6017; twist-hamilton.1**
    - **Dee Hopkins; 740-305-3198; hopkins.1093**

Supervisor Snapshot:

- *Show work processes online (Workday, Teams, OneDrive)*
- *Connect new employee to a local experienced office support professional and other helpful resources to get started.*
- *Order business cards (if applicable)*
- *Discuss Performance Management Process*

First Month:

The first month will be filled with all sorts of tasks, trainings, events, opportunities, and meetings. Be sure to save time to check these items off your list of things to do:

- ☐ **DON'T FORGET: Make benefits selections (between 1st and 30th day)**
  - **Review Additional Benefits too, which includes a variety of employeediscounts**
  - **Employee Assistance Program**
  - **Your Plan for Health**
- ☐ **Obtain University ID – BUCKID**
- ☐ **Merchandise and Apparel Guidelines – Extension**

  Ordering merchandise and apparel for Extension, including Ohio 4-H, can seem like a daunting task. We are hopeful that these revised Merchandise and Apparel Guidelines will prove to be a beneficial resource to you as you order garments, pens, pencils, and other Extension items in the future. These guidelines include the most recent instructions from the university Brand Center. Fiscal will be looking for proof of brand approval on any purchase using university funds.
  - **Extension Merchandise and Apparel Guidelines are available here – go.osu.edu/extension_merchandapparel**

  Because Ohio 4-H items are unique and are co-branded with the 4-H emblem, we created a separate set of guidelines for 4-H. This guidance reflects guidance from Ohio State and the National 4-H Council.
  - **Ohio 4-H Merchandise and Apparel Guidelines are available here – go.osu.edu/ohio4h_merchandapparel**
- ☐ **Buckeye Learn Trainings buckeyelearn.osu.edu (check with your Area Leader to see if this applies to you)**
  - **The Family Educational Rights and Privacy Act at Ohio State**
  - **Institutional Data Policy**
  - **PCard Use and Responsibilities**
  - **TAS. Once training is complete, send a request to Sam Deskin.2 to request access to The Advancement System**
  - **Fiscal Stewardship for All**
  - **Preventing Fraud**
  - **Youth Protection at The Ohio State University**
- ☐ **Create a calendar of important tasks, events, and deadlines (electronic or hard copy)**
- ☐ **Connect with your mentor and colleagues (area leader and other office support staff)**
  - **Visit another office to observe organization practices**
- ☐ **Learn about opportunities with professional associations**
  - **Learn about JCEP**
  - **Staff Advisory Council**
  - **ESP**

- NAE4HYDP
- NACAA
- NEAFCS
- NACDEP
- ANREP
- NAEPSDP

☐ Strategies for efficiently keeping track of daily office business and events

☐ Explore the technology tools available to you to use in your work, e.g.

Resources:
- OTDI – Software Request
- URL shortening at go.osu.edu

Survey platforms:
- Qualtrics
  - Need to request upgrade to publish survey (Debby Lewis.205)
  - Qualtrics/Nelnet Support in Teams

Communications:
- BuckeyeLearn
- Zoom
- Teams
- OneDrive

☐ Review university policies – search for:
- Sexual misconduct
- Workplace violence
- Youth Activities and Programs

☐ Discuss with your supervisor procedures to deal with disgruntled clientele or employees

☐ Discussion with peers, mentors, and supervisor about informal rules and norms in Extension
- Expectations related to balance of professional and personal lives
- Historical perspective on how prior programs were developed and delivered

☐ Locate/explore important resources and understand how they can assist you: Review and file for future use.
- OSU Leadership Center
- Ohioline
- Personnel Directory (OSU Find People and Extension directory)
- Ohio State University Library
- Explore professional ethics as an Extension professional

☐ Reward and Recognition gifts to the employee

☐ Connect with colleagues outside your office as opportunities are presented. Including:
- State/regional level administrators,
- State/regional personnel, and
- Personnel in supporting units (i.e. Operations, Learning & Organization

Development (LOD)
    - County personnel regardless of program focus
    - County personnel with the same program focus
- ☐ History and philosophy of the land grant system
- ☐ OSU Extension mission, vision, and strategy
- ☐ What it means to be an Extension Professional
- ☐ Supervisory and Organizational structure in OSU Extension

- ☐ Learn about your community
    - Census Stats (US Census Bureau, and Census of Agriculture)
    - County tour with colleagues or community members
    - Encouraged to attend community events when possible
- ☐ Read about the OSU Extension Impact Areas
- ☐ Read about the OSU Extension Keys
- ☐ Review and understand Extension 14 Core Competencies
- ☐ Locate important local program documents and review (i.e. – program calendar, newsletters, files, etc.)

First 3 Months

By now, you may have established the beginnings of a day-to-day routine and become familiarwith some colleagues who may be a good resource to you in your new role. Below you will find additional tasks to finish out your first 3 months:

- ☐ **Basic overview of the scope, focus, and philosophy of programming in Extension**
  - **Program area**
  - **Develop an understanding of the work your colleagues do**
  - **Understand the expectations of the Educators and Staff in your county office**
  - **Gain understanding to help you promote yourself and the organization**
- ☐ **Participate in trainings targeted to the program you are working in**
  - **trainings relevant to your role including those online**
    - **Administrative Resource Center (ARC) - Workday**
    - **BuckeyeLearn**
    - **PCard**
    - **Drupal (website)**
    - **THIS IS FOR 4-H RELATED POSITIONS ONLY. 4-H Online, etc. (contact Sarah Carpenter carpenter.955@osu.edu)**
- ☐ **Discuss and identify personal performance goals for the first year**
- ☐ **Work with your supervisor to create an individual professional development and growth plan**
- ☐ **Participate in course or trainings to develop or refresh skills**
- ☐ **Become familiar with Extension Volunteer policies and the role they play in all aspects of Extension**
  - **Importance of and significance across all program areas**
  - **Risk management policies (safety, insurance, liability, injuries)**
- ☐ **Meet local stakeholders.**
  - **Commissioners, volunteers, advisory committees, board members**

Supervisor Snapshot:
Serve as a resource to connect to others in OSU Extension and the community
Check-in weekly during the first month

First 6 Months

You are quickly approaching half a year with Extension! Let's continue the list of items to complete on this new career journey:

- ☐ **Continue connecting with colleagues outside your office as opportunities are presented.Including:**
  - **State/regional level administrators**
  - **Personnel in supporting units (i.e., Operations, Learning and Organizational Development (LOD)**
  - **County personnel regardless of program focus**
- ☐ **Learn how to effectively communicate the value of the work you do**
- ☐ **Learn how to effectively work with advisory committees**

First Year

Hard to believe you are completing your first year with Extension! But you've almost reached your 1st Anniversary!

- ☐ **Check-in with yourself and your mentor on managing life/work balance**
- ☐ **Participate in workshops/sessions for professional development**
  - **Determine areas of need based upon earlier conversation with supervisor to identify professional development goals**
- ☐ **Participate in trainings to develop/enhance skills related to core competencies**
- ☐ **Participate in a regional/statewide/national training focused on the functions of your role**

On-Going Learning

- ☐ **Organizational acronyms and jargon**
- ☐ **Working with local, regional, & state advisory committees**
- ☐ **Technical training on new software applications or upgrades**
- ☐ **Trainings/workshops related to:**
  - **Interpersonal skills ~develop/enhance**
  - **Communication skills ~develop/enhance**
  - **Customer service skills ~develop/enhance**
  - **How to work with difficult clientele and co-workers**
  - **How to conduct a needs assessment**
  - **Conflict management/conflict resolution**

Supervisor Snapshot:
Work with new employee to discuss performance goals.

Fiscal Guidance

Purchasing

- **Workday Requisition**
  - **Buckeye Buy – Internal orders with contracted vendors and warehouse orders. (Staples, CDW, etc.)**
  - **Non-Catalog – purchase orders with non-contracted vendors, OSU Extension Publishing.**
- **PCard**
  - **Can be used for travel or non-travel expenses.**
  - **Must provide a detailed receipt for item(s) purchased, complete business purpose and any other required items.**
  - **OSP or Univ cards are available for the offices.**
  - **GET Card – Travel PCard available for travel, given to individual for a specific trip only.**
  - **All expenses reports are to be completed within 10 business days of expense being loaded into Workday.**
- **Local Checking Account**
  - **Will be used for depositing locally received money.**
  - **Restricted to less than $20,000 balance. Overage to be sent to Ohio State University, Dawnn Brown, with OSU Extension Deposit form. Fill out the fields to designate program values money should be deposited.**
  - **Xero is online and available to electronically manage local funds.**
  - **Account is to be balanced monthly. All funds received need to be deposited into the local checking account within 3 business days or if balance is more than $1,000.**
  - **All transactions are to have a two person check and balance system.**
- **Ohio State University purchases are to be tax exempt. Forms to present at time of purchase can be found on the Business and Finance/Ohio State University website.**

Credit Card Payments

- **Nelnet**
  - **Ohio State University's payment portal for online credit card purchases. Available for each office to receive funds from clientele. Each county is set up with one Nelnet portal and manager at *your*countyextension.osu.edu**
- **Credit Card Machine**
  - **Some offices have a credit card machine managed through Ohio State University.**
- **Credit card receipts can be designated into program numbers. Funds are received into FD111 and need to be reconciled monthly.**

Sales Tax

- **Items sold need to be charged tax unless the purchaser is tax-exempt.**
- **Collected sales tax is to reported monthly through the Qualtrics Webform.**

Travel

- **Blanket Spend Authorization**
  - **To be used for monthly travel reimbursement. The SA will be created one per Fiscal Year. Traveler's responsibility to complete annual SA and expense any related expenses. One SA for Blanket Travel per Fiscal Year or Grant.**
  - **SA needs to be fully approved for travel reimbursements to be processed**
  - **To be used for daily travel only, no overnights.**
- **Trip-specific SA**
  - **One fully approved SA per overnight trip is required.**
  - **Arrange airfare through the OSU contracted travel agency. Do not pay for airfare on the Pcard.**
  - **Use rental car agencies approved with the university. Use the login available at travel.osu.edu.**

Equipment Inventory

- **Annually managed and confirmed. Coordinated with Operations fiscal team.**

Record Retention

- **Prior to destroying records, check schedule and complete instructions on website, along with the certificate.**

UniPrint

- **For business cards and professional printing, please use Uniprint (required).**

Branding

- **Guidelines for branding are important. Use an approved supplier for creating merchandise and promotional materials. Get started with our Extension Brand Resources page.**
- **For office signage and branding questions, contact Marissa Mullett.50.**
- **All personalized items created must have branding approval prior to purchasing.**

Fiscal Cycle for Counties

- **Fiscal Year is July 1 - June 30**
- **Sales Tax is reported monthly**
- **County Appropriation Billing is annually reported by county office to Fiscal Operations Team which bills annually, semi-annually or quarterly depending on county requirement.**
- **OTDI billing is semiannual and includes computers, phones and internet.**
- **Purchase Orders are completed through the Workday system. Can be done as needed or blanket purchase orders which are created annually. Blanket POs are due by June 1.**

Training and Links

- **Administrative Resource Center**
- **BuckeyeLearn**
- **Extension Operations Webpage** **(includes Finance Information)**
- **PCard**
- **Qualtrics**
- **CFAES Marketing and Communications Branding**
- **UniPrint**
- **Record Retention**