

# Standard Operating Procedure: ONBOARDING A NEW GRADUATE STUDENT

**Department/Team:** SAS Graduate and Research Program Services

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## **Table of Contents**

<b>TABLE OF CONTENTS</b> .....	<b>II</b>
<b>REVISION HISTORY</b> .....	<b>II</b>
<b>BASIC INFORMATION</b> .....	<b>1</b>
<b>SCOPE</b> .....	<b>1</b>
<b>PURPOSE STATEMENT</b> .....	<b>1</b>
<b>INCLUSIONS</b> .....	<b>1</b>
<b>EXCLUSIONS</b> .....	<b>1</b>
<b>TRIGGERS</b> .....	<b>1</b>
<b>ACTORS</b> .....	<b>2</b>
<b>INTERSECTING PROCESSES</b> .....	<b>2</b>
<b>FORMS UTILIZED</b> .....	<b>2</b>
<b>INFORMATION SYSTEMS UTILIZED</b> .....	<b>2</b>
<b>UNIVERSITY POLICY REFERENCE</b> .....	<b>3</b>
<b>PROCEDURE</b> .....	<b>4</b>
<b>PROCESS MAP</b> .....	<b>4</b>
<b>PROCEDURAL STEPS</b> .....	<b>5</b>
<b>RISK MANAGEMENT</b> .....	<b>6</b>

## **Revision History**

Change Summary	Change Authour	Date
Document created	Scott Moccia	2017/11/01

## **Basic Information**

### **Scope**

*Describe the major purpose of the process covered by this SOP. Detail what procedure should, as well as should not, be guided by the document.*

### ***Purpose Statement***

This SOP describes the actions that are carried out by members of Shared Administrative Services in order to onboard a student whose admission to a graduate program has been confirmed.

### ***Inclusions***

All graduate students at the Ontario Veterinary College will be involved in this process before starting the first semester of their program.

### ***Exclusions***

There are no exclusions for graduate students in this process. Students that are 100% self-funded should still be included (though the final step of creating a payroll appointment would not apply).

### **Triggers**

*Describe the circumstance(s) that initiate the start of this SOP.*

A student at the Ontario Veterinary College has officially been admitted to a graduate program.

## Actors

List the employees involved, directly or indirectly, in carrying out this SOP. Note names and job titles. Also note for each actor whether they are responsible (R), accountable (A), consulted (C) or informed (I) of this process.

Name	Title	RACI
Ariah Easley	Graduate Program Assistant (GPA)	R
Donna Kangas	Graduate Program Assistant (GPA)	R
Christina Voll	Graduate Program Assistant (GPA)	R
Amanda Draycott	Administrative Manager (AMGrad)	A
Holly Illman	Administrative Manager (AMDept)	R
Sharita Carter	Administrative Manager (AMDept)	R
Melana Nam	Administrative Manager (AMDept)	R
Rebecca Obergan	Administrative Assistant (AAHR)	R
Scott Moccia	College Information Officer	C
Various	Faculty Advisor (FA)	I

## Intersecting Processes

List all other SOPs that are impacted by or will impact this one.

SOP Name	Department/Team Owner
Admissions	SAS Graduate Program Services
Departmental Onboarding Logistics	SAS Departmental Services
Create a New Payroll Appointment	SAS Human Resource Services

## Forms Utilized

List all forms involved in capturing data points. Also reference the use case document that maps all data points utilized throughout this process. College Information Officer is main point of contact for all form based inquiries.

Form Name	Form Location (URL or file path)
Enrolment Form	<a href="https://ovc.uoguelph.ca/sas/forms">https://ovc.uoguelph.ca/sas/forms</a>
Human Resources Data Form	V:/ Shared Administrative Services / Master Document Repository / Forms

**Comment [SM1]:** I know there are more forms needed. Not sure what the grad studies related forms are.

## Information Systems Utilized

List all system involved in storing data points or managing communications. College Information Officer is main point of contact for all system based inquiries.

System Name	System Location (URL or file path)
Footprints	<a href="https://footprints.ccs.uoguelph.ca/MRcgi/MRentrancePage.pl">https://footprints.ccs.uoguelph.ca/MRcgi/MRentrancePage.pl</a>
Graduate Student	V:/ Shared Administrative Services / OVC Graduate and

Information System (GSIS)	Research Program Services / _ Graduate Student Information System / Grads.accdb
Human Resource Employee Records (HRER)	<a href="https://hrs.cs.uoguelph.ca:5001/pls/hr/f?p=1600:101">https://hrs.cs.uoguelph.ca:5001/pls/hr/f?p=1600:101</a>

**University Policy Reference**

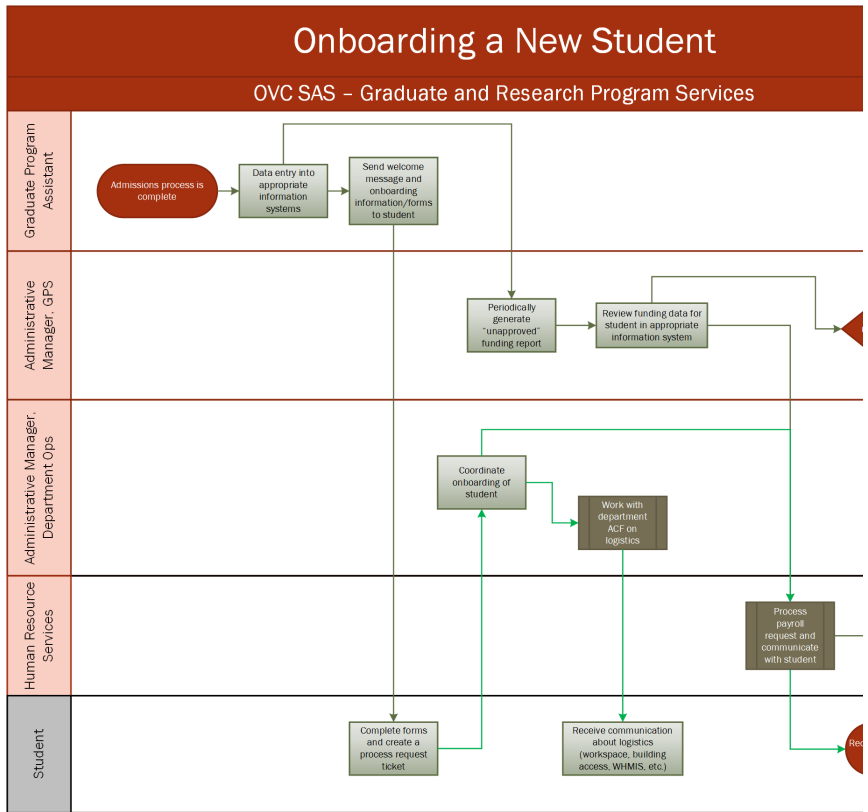
List all University level policies that impact this process.

Policy Name	Governing Department

Comment [SM2]: Not sure about this one

# Procedure

## Process Map



**NOTES:**

- Red “swim lanes” represent SAS personnel
- Grey “swim lanes” represent clients of SAS
- Green directional lines indicate procedural step occurring in a ticketing system
- Dark grey boxes indicate initiation of a procedural step directed by an intersecting SOP

## Procedural Steps

*Concisely list all detailed procedural steps required to carry out the SOP from start to finish. The numbered or bulleted list should reference and reflect the process map above. Use screen shots of relevant systems and forms where appropriate.*

1. The **GPA** of the student's home department will enter the appropriate data points into the GSIS database (demographic, enrolment, advisory committee, funding).
2. The **GPA** sends a welcome message (via email) to each incoming student. The message contains information about the onboarding process as well as links to all require forms (as dictated in 'Forms' section above). This message must contain mention that adherence to this process, as prescribed, is required for ALL students.
3. The **AMGrad** will run the "Unapproved Funding" report from GSIS once per week during peak intake times in August, December and April (or as needed)
4. The **AMGrad** will review all entries from the above report to ensure correctness, stamp approval, and add FUGPO coding to GSIS
5. Each **graduate student** must submit all completed forms, via email, to [ovcsas@uoguelph.ca](mailto:ovcsas@uoguelph.ca) (the submission of this email will automatically create a service request ticket in the Footprints system)
6. The **AMDept** will be assigned the ticket created above. Working with their **AACF** they will coordinate the logistical elements of bringing a new student into the department (physical location, proximity access, welcome ceremony, etc.)
  - a. This step has an SOP of its own
7. The **AMDept** will complete the required fields in the Human Resources Data Form (if student requires an OVC payroll appointment) and attach to the service request ticket (they must verify with data that has been approved in GSIS by **AMGrad** in previous step)
8. The **AMDept** will then assign the ticket to the **AAHR**
9. If a payroll through OVC is required, the **AAHR** will create appointment in HRER
  - a. This step has an SOP of its own
10. The **AAHR** will contact the graduate student to confirm onboarding has been completed, providing pertinent details about payroll as needed
11. The **AAHR** will update GSIS funding records with appointment number generated by HRER

## Risk Management

*Describe activities performed that manage and/or identify risk inherent with this process.*

Utilizing the Footprints ticketing system is the single most important risk mitigation factor in this SOP. There are two major risks inherent with this process, 1) a department is unaware of a new student, and 2) a payroll appointment is set up incorrectly or not at all. Funneling all requests through a single point of contact maximizes visibility (nothing lost in personal email or various organizational accounts). It also ensures procedural steps occur in the appropriate order, providing approvals and verification. Involving the AMGrad in all student onboarding ensures consistency and accountability for all funding decisions college wide.

## Frequency/Effort

- Daily
- Weekly
- Monthly
- Quarterly
- Semesterly
- Annually