TRAINING INDUSTRIES LTD

Onboarding Engagement & Readiness (OER) Record

Section 1: Employee & Orientation Information

Employee Name: _____ Orientation Dates: _____

Position: _____ Employee Supervisor: _____

Department: _____ Orientation Type: Hybrid ☐ Virtual ☐

Section 2: Attendance & Punctuality

	On Time:	Late:	Minutes Late:	N/A	Notes:
Day 1					
Arrival					
A.M. Break					
Lunch					
P.M. Break					
Day 2					
Arrival					
A.M. Break					
Lunch					
P.M. Break					
Day 3					
Arrival					
A.M. Break					
Lunch					
P.M. Break					
Day 4					
Arrival					
A.M. Break					
Lunch					
P.M. Break					

Section 3: Engagement Indicators

Overall Engagement in Orientation:

Highly Engaged: ☐	Engaged: ☐	Partially Engaged: ☐	Disengaged: ☐
See the OER Guide for differentiation criteria for overall engagement score.			

Indicator:	Always	Sometimes	Never	Comments:
Asked appropriate clarifying questions	☐	☐	☐	
Demonstrated curiosity about Agency programs / services	☐	☐	☐	
Participated actively in discussions	☐	☐	☐	
Requested additional learning resources / modules in writing	☐	☐	☐	
Sought help appropriately when needed without becoming overwhelmed	☐	☐	☐	
Responded appropriately to feedback	☐	☐	☐	
Showed initiative (Asked for next steps; followed instructions)	☐	☐	☐	

Section 3: Engagement Indicators Continued

Indicator:	Always	Sometimes	Never	Comments:
Took notes / Reviewed Reference Materials	☐	☐	☐	
Utilized a good camera angle during virtual orientation	☐	☐	☐	
Was outside of the camera's view and/or moved off camera	☐	☐	☐	
Posture suggests that the new hire is engaged with the material and presenters	☐	☐	☐	
Inappropriate Personal Phone Usage Suspected	☐	☐	☐	
Thanked the departmental presenters throughout orientation	☐	☐	☐	
Thanked the Trainers at the end of orientation	☐	☐	☐	

Number of Personal Breaks Taken: ☐.

Section 4: Communication Skills

Skill:	Strong	Sufficient	Needs Support	Comments:
Active Listening	☐	☐	☐	
Verbal Communication	☐	☐	☐	
Digital / Virtual Communication (Responded to Microsoft Teams messages and/or Emails)	☐	☐	☐	

Section 5: Organizational Skills

Behavior:	Yes	No	Comments:
Prepared for **each** day • Has all required materials • Joined meeting • Navigated to office	☐	☐	
Follows Schedule Independently	☐	☐	
Maintains Focus during Sessions	☐	☐	
Employee returned all HR-related documents appropriately based upon the Training Department's best information	☐	☐	

Section 6: Professional Characteristics

Characteristic:	Always	Sometimes	Never	Comments:
Attentive	☐	☐	☐	
Respectful	☐	☐	☐	
Courteous	☐	☐	☐	
Demonstrated appropriate Peer Interaction	☐	☐	☐	

Section 7: Appearance & Dress:

	Yes	No	N/A	Comments:
Dressed appropriately for in-person sessions	☐	☐	☐	
Dressed appropriately for virtual sessions	☐	☐	☐	

Section 8: Technology Skills

Employee required help with the technology tools listed below.

Tool:	Yes	No	Comments:
Outlook	☐	☐	
Browser (Edge or Chrome)	☐	☐	
Teams	☐	☐	
Webex	☐	☐	
iPhone	☐	☐	
HRIS	☐	☐	
The employee required assistance to set up their technology devices at home for virtual orientation	☐	☐	

Section 9: Required Documents (Return times can vary):

Document:	Completed by Due Date	Completed After Due Date	Not Yet Completed
Training Acknowledgements	☐	☐	☐
Orientation Evaluation	☐	☐	☐

Section 10: Paycom & Other Trainings

Training:	Completed by Due Date	Completed After Due Date	Not Yet Completed	Not Applicable for Position
HIPAA	☐	☐	☐	☐
EEOC: Preventing Harassment & Discrimination	☐	☐	☐	☐
CMS Medicare Fraud, Waste, and Abuse	☐	☐	☐	☐
Navex Compliance Reporting Software	☐	☐	☐	☐
Level of Care Comprehension Quiz	☐	☐	☐	☐
KnowBe4 Cybersecurity Awareness	☐	☐	☐	☐
Abuse, Neglect, and Exploitation	☐	☐	☐	☐
Restraints and Restrictive Interventions	☐	☐	☐	☐
Pingboard (Workleap)	☐	☐	☐	☐
PolicyStat (RLDatix)	☐	☐	☐	☐
iPhone	☐	☐	☐	☐
Field Safety	☐	☐	☐	☐
Quality Improvement Training	☐	☐	☐	☐
Use of A.I. in the Workplace	☐	☐	☐	☐
Expense Report Training	☐	☐	☐	☐

Training Notes:

TRAINING INDUSTRIES LTD

OER Guide

Section 3: Overall Engagement Indicator

Highly Engaged:

- Actively participates in all/most orientation activities.
- Asks thoughtful questions and seeks clarification when needed.
- Demonstrates enthusiasm for learning and adapting to organizational culture.
- Proactively connects with peers, trainers, and resources.
- Maintains strong Professionalism (Camera on in virtual settings, follows etiquette guidelines).

Engaged:

- Consistently attentive and participates when prompted.
- Completes required tasks and activities with minimal follow-up.
- Shows interest in understanding processes and expectations.
- Interacts appropriately with peers and facilitators.

Partially Engaged:

- Participation is inconsistent; may appear distracted at times.
- Completes required tasks but may need repeated prompting or reminders.
- Limited interaction or initiative in discussions/activities.
- Demonstrates some understanding of materials but may lack confidence or clarity

Disengaged:

- Shows minimal participation in activities or discussions.
- Frequently distracted or detached from orientation content.
- Requires multiple reminders or follow-ups to complete tasks.
- Limited demonstration of understanding or interest in onboarding content.

Section 4: Communication Skills

Active Listening:

- Maintains attentive posture and eye contact with presenters.
- Nods, paraphrases, or summarizes key points to show understanding.
- Asks clarifying questions at appropriate moments.
- Takes notes consistently and refers back to them when responding.
- Avoids interrupting and waits for their turn to speak.

Verbal Communication:

- Speaks clearly and at an appropriate pace.
- Uses respectful tone and professional language.
- Asks relevant and thoughtful questions.
- Stays on topic and communicates concisely.

Digital / Virtual Communication:

- Responds to emails and Teams messages
- Uses a professional camera angle and leaves camera on when required.
- Mutes / unmutes appropriately and uses chat features appropriate
- Follows digital etiquette (not multitasking, minimizing disruptions)