OFFICE OF THE GENERAL COUNSEL
Division of Operations-Management

MEMORANDUM OM 13-63 **September 11, 2013**

TO: Regional Directors, Officers-in-Charge, and Resident Officers

FROM: Anne Purcell, Associate General Counsel

SUBJECT: Pathways Checklists for Professional and Administrative Student Interns

The Pathways Internship Program established by OPM requires agencies to have a training program for all participants. Agency management in conjunction with the Office of Employee Development have established separate Training Checklists for new student professional employees and administrative staff employed by the Agency through the Program. Similar checklists have proved to be useful aids to Regional Office managers and supervisors and valuable tools for introducing our new employees to the Agency. The Pathways Checklists are attached to this memorandum.

The Checklists detail those areas that should be covered within the first ninety (90) days of the entry-on-duty of a Pathways Intern, including the standard orientation for all Agency employees that is covered by the Human Resources Branch or the local office. For those Pathways Interns working for a shorter time period, the Region should adjust the time period to ensure that the intern receives training necessary to perform the assigned tasks and to learn more about the Agency and its mission. The training may be tailored to address the needs of the Pathways Intern and the nature of the work that is being performed by that individual. In addition, the Region may consider using the material for the Summer Intern Program to supplement its training. The most recent program sessions and materials are located on the OED *Insider* page under Professional Development and the Summer Law Clerk and Intern Program.

If you have any questions regarding the use of these Checklists, or suggested topics to include in future revisions, please feel free to contact Deputy Assistant General Counsel Joan Sullivan or your representative in Operations-Management.

/s/

A. P.

Attachments

cc: NLRBU

Pathways Intern Name:

_____

Start Date: _____

ORIENTATION CHECKLIST
Professional Employee

A. Regional Director or designee

1. Welcome & Introduction to Staff Members
2. Provide orientation packet

B. Office Manager

New Employee Orientation:

1. Employee/Personnel Information
2. New Employee Orientation on the Agency Intranet

C. Supervisor

1. Welcome
2. Supervisor's role in office

Administrative Items:

1. Provide emergency contact telephone numbers (for emergencies or problems)
2. Explain OPM/Agency background check
3. Explain Information Officer Program
4. How to use Agency telephone systems
5. Use and security of computers, e-mail, laptop computers, and cell telephone (if applicable)
6. Rules and regulations concerning conflict of interest
7. Security and confidentiality of case files
8. Compensatory time procedures
9. NLRB Intranet, Administrative Services
10. Official travel procedures
11. GSA federal travel regulations website
12. Case Docketing Procedure
13. Explain other jobs in office and in Headquarters

Casehandling Items:

1. New Employee Video Tape (with Agency Organization chart and Case Flow chart)
2. Explain the Employee Development Website and various training opportunities: Training Modules, Compliance Training Shorts and the Summer Intern Program
3. Issue set of or explain how to access the online Rules and Regulations, Casehandling Manuals and Guide to R-case law and Procedure
4. Explain use of Board Volumes
5. Assign relevant sections of Casehandling Manual to review, as needed, as Investigations are assigned.
6. Explain use of Citenet or provide access to Citenet training: Summer Program Citenet Session.
7. Explain use of Westlaw's Key Cite
8. Case Routing Procedures
9. Explain Impact Analysis System and associated time targets
10. Explain NxGen Case File Telephone Log
11. Explain Role of Counsel and Agency procedures when dealing with represented and/or unrepresented parties or agents of parties – "Skip Counsel" rules
12. Explain Notice of Appearance and Exclusive Representative for Service
13. Explain NxGen and How to the Use NxGen Training Page

D. Regional Director or Designee

1. Mission of Agency, history and function

E. Supervisor or Region's Designee

1. Role of Managers (DRD, ARD, RA, DRA, OIC, RO) & areas of responsibility

F. Supervisor/Office Manager/Regional Designee

Office Technology:

1. Assess computer-training needs and the OED Intranet site
2. Computer/printer usage
3. NxGen
4. Electronic forms
5. Agency website -- www.nlrb.gov
6. Agency Intranet -- http://insider.nlrb.gov/
7. Provide Westlaw training -- http://www.westcui.com/gov/nlrb/, if necessary
8. Provide Westlaw password
9. Internet policy and e-mail system

G. EEO Counselor

1. Welcome
2. Explain EEO policies/procedures
3. Policy on sexual harassment

H. Compliance Officer

1. Explain Compliance and Compliance Procedures
2. Explain the Compliance and Remedies Website: See Compliance and Remedies Insider Page

I. FOIA Officer

1. Explain Freedom Of Information Act (FOIA) and FOIA Procedures

J. Further Substantive Training

1. Schedule observation/assist in representation elections (as available)
2. Schedule observation of R-Case hearings (as available)
3. Schedule observation of C-Case hearings (as available)
4. Schedule observation/assist in Joint Conferences (as available)
5. Schedule observation/assist in Settlement Conference (as available)
6. Schedule observation of affidavits
7. Explain use and give examples of:
   Agenda Minutes
   Final Investigative Reports
   Recommendation to Defer
8. Explain Section 10(b) of the Act
9. Explain Section 10(j) of the Act and issue GC Section 10(j) guidance Memo
10. Explain *Collyer* & *Dubo* deferral policy
11. Discuss R-Case procedures, including:
    Processing petitions
    Request to Proceed
    Decision and Direction of Election
    Requests for Review
    Procedure for impounded and determinative challenged ballots
    R-Case time targets

Completed: _____ Date: _____

(Supervisor)

Pathways Intern Name:

_____

Start Date: _____

ORIENTATION CHECKLIST
Administrative Staff Employee

A. Office Manager

1. Welcome & Introduction to Staff
2. Provide orientation packet

Employee/Personnel Information:

1. Employee/Personnel Information
2. New Employee Orientation on the Agency Intranet

Career Development:

1. Position Description
2. Understudy desks
3. Bridge Program
4. Options for Converting to a Professional Position (OM 03-78)
5. Explain the Employee Development Website and various training opportunities

B. Regional Director or Director's designee

1. Mission of Agency, history, and function

C. Office Manager or Assistant Office Manager

Roles of Support Staff:

1. Docket Clerk
2. Election Clerk
3. Secretary to ARD
4. DRA Secretary
5. RA Secretary and/or DRD Secretary
6. RD Secretary
7. Officer-in-Charge or Resident Officer Secretary
8. Compliance Assistant
9. Case Processing Assistant
10. Litigation Support Assistant
11. Automation Staff Assistant
12. Program Analyst

Office Orientation:

1. Switch board/Telephone systems/Voicemail
2. Photocopy machine
3. Fax machine
4. Postal meter/mail distribution
5. Office supplies and forms
6. Docketing and Closed/Pending case files
7. Travel vouchers
8. NLRB Intranet, Administrative Services
9. GSA federal travel regulations website
10. Security and confidentiality of case files

Office Technology:

1. Assess computer-training needs
2. Computer/printer usage
3. NxGen for Support Staff
4. Agency website -- www.nlrb.gov
5. Agency Intranet -- http://insider.nlrb.gov/
6. Internet policy and e-mail system
7. Online Agency forms

D. Supervisor or Region's Designee

Roles of Managerial Staff & Areas of Responsibility:

1. Regional Director
2. Deputy Regional Director
3. Assistant to the Regional Director
4. Regional Attorney
5. Deputy Regional Attorney
6. Officer-in-Charge or Resident Officer

Roles of Professional Staff:

1. Field examiner functions
2. Field attorney functions
3. Supervisory role
4. Compliance Officer
5. Information Officer
6. Freedom of Information Act (FOIA) Officer

E. EEO Counselor

1. Welcome
2. Explain EEO policies/procedures
3. Policy on sexual harassment

F. Support Staff as Member of Regional Office Team (Region's Designee)

1. New Employee Videotape (with Agency Organization chart and Case Flow chart)

Completed: _____ Date: _____
(Supervisor)