NEW EMPLOYEE ONBOARDING TOOL FOR MANAGERS

This is a suggested onboarding tool for new employees and can be used University-wide; based on work location, not all topics may be applicable. Departments are free to customize this tool for their employee onboarding needs.

*Indicates for Medical Center employees only.

TOPIC	RESOURCES/ POINT PERSON	COMPLETED (INITIALS/DATE)
PRIOR TO DAY 1		
Contact the new hire and confirm the details for their first day of work. Your new hire will receive a message from myURHR [Workday] sent to the personal email address provided in their application, which will include details to claim their **University of Rochester Network Identity** required to gain systems access to begin onboarding tasks (the manager will also receive a copy of this message).		
Announce new employee's arrival date and role in the department.		
Send a welcome letter/email/text to the new employee to begin building the relationship. Click the link to find suggested templates.		
Once the employee's work email has been set up, encourage team members to send a welcome email message.		
Set up new employee's work area (as applicable): ✓ Arrange for computer and establish system access ✓ Set up telephone/voicemail and cell phone ✓ Arrange for appropriate office supplies ✓ Arrange for keys and badge access ✓ Order name plate		
Prepare agenda for new employee's first week: ✓ Develop a training plan. Arrange for a buddy, or mentor if appropriate ✓ Identify and schedule any training to be completed in the next 2 months ✓ Identify meetings (team meetings, 1:1's etc.) that your new employee should attend ✓ Identify key partners/leaders/ employees for new employee to meet during the first week and schedule meetings, if applicable		
Prepare for first day welcome:		

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✓ Identify who will greet employee ✓ Arrange to make the first day special (for example: schedule a team lunch or display a welcome sign, etc.)		

DAY 1 – 2		
Be sure you are familiar with the new employee orientation process for your area. For many departments, employees report directly to their departments on day 1 and complete new employee orientation online modules throughout the first week.		
Introduce employee to team members.		
Introduce employee to orientation buddy/mentor.		
Provide a tour of work area, department, building, and other key points of interest in the work location, including: ✓ The break room/restroom ✓ Where an employee can store coat/belongings ✓ Cafeteria/dining halls/vending/other onsite services ✓ Appropriate timeclock for swiping (if applicable)		
Guide employee through completing the New Employee Orientation Checklist, located on the UR Human Resources New Employee Orientation website, which includes: ✓ New AD account initialization ✓ Email access ✓ myURHR Onboarding Tasks ✓ Obtaining an ID badge ✓ Registering for parking ✓ MyPath new employee orientation training ✓ Total Rewards benefits information/enrollment		
Show employee how to log in to **myURHR Workday** to view their pay slip, organizational chart, and other personal information (i.e. address). Also, show employee how to log in to **myURHR UKG** for time reporting functionality (i.e. entering time worked or submitting time off requests).		
Review the new employee's orientation training plan: ✓ Task training ✓ System access/training		

WEEK 1 – 2		
Review department policies and procedures: ✓ Job schedule and lunch/break schedule ✓ Dress code ✓ Emergency and safety protocols ✓ Time reporting/payroll ✓ Call in procedures		

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✓ Vacation scheduling ✓ Overtime policy ✓ Review any other relevant University/URMC policies and procedures		
Orient the employee to the Department/Division/Work Unit: ✓ Discuss department goals and priorities ✓ Explain how employee's work and co-workers' work contribute to the department's goals and priorities ✓ Provide departmental phone list and organizational chart ✓ Review current department programs ✓ Review department-specific policies, discuss department resources ✓ Provide a virtual tour of the UR HR internet website, *URMC intranet, and any department website		
Review functional job description and progress made in the new employee training plan: ✓ Schedule regular 1:1's to allow for feedback and questions		
Discuss the Meliora and *ICARE values and best practice behaviors that contribute to service excellence. *Enroll medical center employees in the In-Person ICARE Training Sessions.		
Explain how to use email and voicemail. Share appropriate email signature template.		
Review our Performance Management Program, including the probationary and Annual Performance Reviews and the wage and salary program.		
Allow time to complete required training in MyPath.		
Schedule a meeting at the end of the first week to check in with the new employee. Use the Discussion Guide for First Check Ins to conduct the conversation.		

MONTHS 1 – 2

Meet regularly at 1-on-1 meetings with new employee to answer questions, review training progress and provide feedback. Ensure employee is acclimating to the position, team, and department. View recommended conversation starters at the 30, 60, and 90-day milestones.		
Ensure new employee understands the relationship between their job, the department and the organization.		
On a regular basis, recognize accomplishments and demonstration of critical behaviors to date.		

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Share team employee engagement results and any applicable team action plans.		
*Discuss the employees' role in process improvement which supports the ICARE value of Excellence; complete the "Introduction to Quality/ Process Improvement" training module in [MyPath]().		
Review Annual Mandatory In-Service Training requirements and timelines.		

REMAINDER OF INITIAL ONBOARDING PERIOD		
Month 3 (non-exempt), Month 6 (exempt): Recommended best practice is to hold a formal performance discussion to evaluate progress during the introductory period. Involve HR Business Partner if there are performance concerns.		
Continue Regular 1:1 meetings and recognition efforts.		
Support efforts to introduce employee to other colleagues and establish relationships throughout the organization.		
Month 5 (non-exempt), Month 11 (exempt): Evaluate performance and determine if the employee is on track to successfully complete the introductory period. Involve HR Business Partner if there are performance concerns. Begin to complete the End of Probation Performance Review in MyPath.		
Month 6 (non-exempt), Month 12 (exempt): Deliver end-of-probation performance review.		

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