



## Manager's New Employee Onboarding Tool

*This is a suggested onboarding tool and thus not all topics may be applicable. Departments are free to customize this tool for their employee onboarding needs.*

Topic	Resources/ Point Person	Completed (Initials/Date)
<b>Prior to Day 1</b>		
Contact employee and confirm the details for their first day. Human Resources will send your new employee an orientation confirmation letter with location, time and parking details.		
Announce new employee's arrival date and role in the department.		
Encourage team members to send new employee a welcome email.		
Set up new employee's work area: <ul style="list-style-type: none"> <li>✓ Arrange for computer and establish system access</li> <li>✓ Set up telephone, voicemail and cell phone</li> <li>✓ Arrange for appropriate office supplies</li> <li>✓ Arrange for keys and badge access</li> <li>✓ Order name plate</li> </ul>		
Prepare agenda for new employee's first week: <ul style="list-style-type: none"> <li>✓ Develop a training plan. Arrange for a buddy, or mentor if appropriate</li> <li>✓ Identify and schedule any training to be completed in the 2 months</li> <li>✓ Identify meetings (team meetings, 1:1's etc.) that your new employee should attend</li> <li>✓ Identify key partners/leaders/employees for new employee to meet during the first week and schedule meetings if applicable</li> </ul>		
Prepare for first day welcome: <ul style="list-style-type: none"> <li>✓ Identify who will greet employee</li> <li>✓ Arrange (if possible) to make the first day special, for example, a team lunch, a welcome card etc.</li> </ul>		
<b>Day 1</b>		
Employee to attend New Hire Orientation.		
Greet employee after New Hire Orientation. Ensure employee has received 30 minute meal period. Optionally, the new employee may be invited to join the department after the end of the in-person session for introductions and lunch at the manager's discretion.		
Introduce employee to team members.		
Introduce employee to buddy/mentor.		
Provide a tour of office and Medical Center, covering: <ul style="list-style-type: none"> <li>✓ The break room/bathroom</li> </ul>		

<ul style="list-style-type: none"> <li>✓ Where an employee can store coat/belongings</li> <li>✓ Cafeteria and key med center facilities</li> <li>✓ Where to access online maps</li> <li>✓ Appropriate time-clock for swiping (if applicable)</li> </ul>		
Have employee set up netID. Ensure employee has ID Card.		
Assist employee in getting parking permit (if applicable).		
<p>Assist with logging into MyPath and review required training modules and deadlines:</p> <ul style="list-style-type: none"> <li>✓ Mandatories for Medical Center Employees- Due Day 1, ~60 minutes to complete</li> <li>✓ Online Universal New Employee Training- Due Week 1, ~60 minutes to complete: <ul style="list-style-type: none"> <li>○ Benefits enrollment</li> <li>○ Compliance</li> <li>○ University Policies and Procedures</li> <li>○ Payroll &amp; HRMS</li> <li>○ Public Safety, Parking and Environmental Health &amp; Safety</li> </ul> </li> <li>✓ Online Medical Center New Employee Training- Due Week 1, ~60 minutes to complete <ul style="list-style-type: none"> <li>○ HIPAA</li> <li>○ ICARE Values and Contract</li> <li>○ Lean</li> </ul> </li> </ul>		
<b>Week 1 – 2</b>		
<p>Review department policies and procedures:</p> <ul style="list-style-type: none"> <li>✓ Job schedule and lunch/break schedule</li> <li>✓ Dress code</li> <li>✓ Emergency and safety protocols</li> <li>✓ Time reporting/payroll</li> <li>✓ Call in procedures</li> <li>✓ Vacation scheduling</li> <li>✓ Overtime policy</li> <li>✓ Review other relevant University policies and procedures</li> </ul>		
<p>Orient employee to Department/Division/Work Unit:</p> <ul style="list-style-type: none"> <li>✓ Discuss department goals and priorities</li> <li>✓ Explain how employee’s work and co-workers’ work contributes to department’s goals and priorities</li> <li>✓ Provide departmental phone list and organizational chart</li> <li>✓ Review current department programs</li> <li>✓ Review department specific policies, discuss department resources</li> </ul>		
<p>Review functional job descriptions and on-boarding training plan:</p> <ul style="list-style-type: none"> <li>✓ Review Job specific training requirements and training schedule</li> <li>✓ Develop goals (specific, measurable, achievable, relevant and time-bound = SMART) for both training and for performance</li> <li>✓ Explain how performance will be evaluated during the probationary period</li> </ul>		

✓ Schedule regular 1:1's to allow for feedback and questions		
Explain URM/University and department's mission, vision statements and goals. Explain the new employee's role in fulfilling the mission, vision and goals for the organization.		
Explain the I-CARE values and best practice behaviors that contribute to service excellence. Enroll employee in the In-Person ICARE Training Session (available April 2016).		
Explain how to use email, Intranet, and voicemail. Share appropriate email signature template.		
Discuss initial assignments and training plan, department goals and objectives.		
Review Performance Management Program, including the Annual Performance Review and the wage and salary program.		
Allow time to complete required training in MyPath.		
<b>Months 1-2</b>		
Set up regular 1-on-1 meetings with new employee to answer questions, review training progress and provide feedback. Ensure employee is being acclimated to the position, team and department.		
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.		
Share team employee engagement results and any applicable team action plan.		
Review Mandatory In-Service Training requirements and timelines.		
<b>Remainder of Introductory Period</b>		
Month 3 (non-exempt) Month 6 (exempt): Recommended best practice to hold formal performance discussion to evaluate progress during 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 employee is on track to successfully complete introductory period. Involve HR Business Partner if there are performance concerns. Begin to complete the End of Probation Review in MyPath.		
Month 6 (non-exempt) Month 12 (exempt): Deliver end of probation performance review. Evaluate whether employee qualifies for an end of probation compensation increase per the wage and salary program.		