



**Supervisor's Guide**  
To Effectively Onboarding a New Employee

## Using this Guide

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The *Supervisor's Onboarding Guide* does just that – it *guides* you through the first months of your new employee's employment, providing instructions to complete certain actions that will help him or her succeed. **The culmination of these is a series of meetings with you.**

Within each phase, you – as the supervisor – also have actions you should complete.

*The more you can do upfront to prepare, the more successful you and your new employee will be.*

There is a pattern within each phase:

- **Review** what the new employee has accomplished to date.
- **Do** a list of actions.
- **Discuss** critical topics with the new employee.
- **Plan** for the next phase.

**Important Note:** Every employee and situation is different. The information covered – *as well as the timeline* – is important, but you have the final decision on whether to cover everything exactly as prescribed.

### Supervisor Support

In this process, you may feel you have an increased level of responsibility, but you also have an increased level of support. ITS HR is available to help support you and answer questions.

## The New Employee Onboarding Process

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Integrating into a new job and environment takes time. We have divided it into five phases.

Phase	Objective	Sample New Employee Activities
I. Preparing for the First Day	Create the new employee's first impression. Prepares them for employment and completes administrative requirements.	<ul style="list-style-type: none"> <li>• Completes new hire paperwork.</li> <li>• Reviews information about benefits.</li> <li>• Receives welcome call from supervisor.</li> <li>• Prepares for the first day.</li> </ul>
II. First Day	Welcome the employee! A day of discovery, administration and introductions.	<ul style="list-style-type: none"> <li>• Meets with ITS HR to complete/finish new hire paperwork.</li> <li>• Tours department and workspace.</li> <li>• Meets with supervisor.</li> </ul>
III. First Week	Help the employee get acquainted with the University and with his or her new role.	<ul style="list-style-type: none"> <li>• Shadows a colleague and on-the-job training.</li> <li>• Meets with supervisor.</li> </ul>
IV. First Month	The employee becomes a productive member of the ITS family.	<ul style="list-style-type: none"> <li>• Meets with other areas to learn their functions.</li> <li>• Learns more about ITS.</li> <li>• Immerses into ITS culture.</li> <li>• Meets with supervisor and creates development plan.</li> </ul>
V. Future Actions	The employee continues his or her orientation. Onboarding is an ongoing learning process.	<ul style="list-style-type: none"> <li>• Attends any formal training.</li> <li>• 30-, 60-, and 90-day performance reviews and annual evaluation.</li> </ul>

## The New Employee Onboarding Process

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Role	Responsibilities
Supervisor or Designee	<ul style="list-style-type: none"><li>• Preparing workspace</li><li>• Introduction to colleagues</li><li>• Departmental procedures</li><li>• Job expectations</li><li>• Job specific training</li><li>• Ensuring completion of required training (if applicable)</li><li>• Ensuring attendance at New Employee Orientation</li><li>• Evaluation process</li><li>• Conducting 90-day evaluation</li></ul>
ITS HR	<ul style="list-style-type: none"><li>• Administrative information</li><li>• Benefits</li><li>• University processes</li><li>• Other information as requested</li></ul>

### **\*Your Role versus Your Designee**

You may choose to have a Designee. This person you choose will help orient the new employee and be a “go to” person when you are unavailable, while assisting in the many tasks in order to prepare and onboard a new employee.

### **A few tips:**

- Choose someone knowledgeable, but also eager and patient.
- It’s best to delegate, not completely disassociate yourself from the process.
- You decide how to split up tasks between you and your designee.
- Include this new role into the designee’s performance evaluation.

## Phase I: Preparing for Your New Employee's First Day

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Now that you're expecting a new employee, planning for his or her arrival is critical. A new employee looks for immediate confirmation that joining was the right decision.

### Review what's occurred:

#### Do:

- ✓ Complete the New Employee Checklist.
- ✓ Create a list of Job- and Department- Specific Learning Activities.
- ✓ Review the employee's job description to remind you of the required skills of the position and the strengths of the new employee.
- ✓ Send an email to ITS Staff (or make an announcement in staff meeting) informing them of the new employee; provide background of the person's skills and experience, as well as start date.
- ✓ Create a folder for the employee where you can keep specific information to give them, as well as information about them.
- ✓ Gather all historical information from the predecessor (if possible), such as best practices, files, records and metrics to pass along to the new employee.

#### Discuss:

- ✓ Call and welcome the new employee. Convey how excited you are for their arrival and answer any questions.

#### Plan for Next Phase – Day One:

- ✓ Schedule time on your calendar to meet with the new employee on the afternoon of the first day.
- ✓ Keep your calendar as clear as possible during the employee's first week.

## **New Employee Job- and Department- Specific Learning Activities**

There are three broad categories of information a new employee needs:

1. Generic information about the University for all employees.
2. Department-specific information.
3. Job-specific information.

*Generic* information is provided at the University-wide New Employee Orientation (NEO).

*Department-Specific* and *Job-Specific* information is your responsibility. How you convey this information is up to you and can take many forms:

- Shadowing a colleague in your area
- Meeting with colleagues in other areas whom they will work closely
- Manuals and other documented instructions and procedures
- Coaching sessions conducted by you or others
- Formal training, either classroom or online

Use the worksheet on the next page to aid you in developing a list of Job- and Department- Specific Learning Activities **that the new employee will complete over time.**

**Note:** You will be referring back to this worksheet often throughout your new employee's onboarding.

**Job- and Department- Specific Learning Activities**

Create a list of activities a new employee should complete to learn about the department and job. Some common activities have been populated for you.

When	Activity	Who	Materials	Notes
Day One	Review job description	Supervisor	Job Description	
Day One	Department orientation	Supervisor and/or Designee		
Day One				
Week One	Shadow a colleague in the department			
Week One	Review manuals and other documented procedures			
Week One	Available tools, resources and information			
Week One				
Month One	Coaching with your supervisor and/or others			
Month One	Meeting with colleagues in other areas			
Month One	Other training, either classroom or online			
Month One	Employee Development Plan			
Month One				
Future Actions	Supervisory training, if applicable			
Future Actions				
Future Actions				

# Phase II: Your New Employee's First Day

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It's not the time to overwhelm a new employee, but he or she is excited to get started. Don't assume your employee will come in perfect and knowing everything. You hired the *best person* for the job, but that person still needs guidance.

**Review what's occurred:**

- ✓ Confirm all necessary new hired work has been completed successfully.

**Do:**

- ✓ Upon arriving, introduce new employee to Designee and other team members (ask what name the new employee prefers to go by).
- ✓ Secure additional items new employee needs.

**Discuss:**

- ✓ Conduct first-day meeting with new employee.

**Plan for Next Phase – Week One:**

- ✓ Determine the Job- and Department- Specific Learning Activities the new employee will complete during the first week (see chart on page 6).
- ✓ Schedule a day to have lunch with new employee, and invite him or her.

**Notes:**



## First-Day Meeting with New Employee

Each supervisor approaches a new employee's first day slightly differently, but the goal is to welcome the new employee and provide them with the information to get started.

During your first meeting with the new employee, discuss the following:

- ✓ Review the job description. Explain specific responsibilities and evaluation format and process (as applicable).
- ✓ Discuss your expectations. Explain in what ways they'll be expected to contribute.
- ✓ Provide names of team members and departmental organizational chart.
- ✓ Provide other materials you have collected in the employee's folder.
- ✓ Discuss the department's mission and goals.
- ✓ Who are the department's customers?
- ✓ The new employee's work hours, building hours, lunch hour, break times and overtime policy/procedure (if applicable).
- ✓ Department dress code and any other department-specific policies.
- ✓ Who to call when ill or late reporting to work.
- ✓ Emergency procedures, emergency exits, storm safe area and building managers.
- ✓ The employee's schedule of activities for week one, including:
  - ✓ Job- and Department- Specific Learning Activities from chart (page 6).
  - ✓ Your schedule for the week and the best time to reach you for questions.
  - ✓ Any additional questions the employee might have.

**Tip:** New employees are generally willing to try different behaviors as they adapt to their new environment. The first week, therefore, is a perfect opportunity to provide the employee with a clear understanding of productivity, quality and behavior.

### Notes:

## Department Orientation

On the first day, a new employee with need:

- ✓ Employee Workspace:
  - Phone
  - Personal computer and printer (if applicable)
  - Workspace
  - Supplies
  
- ✓ Department Tour:
  - Location of break rooms and restrooms
  
- ✓ Instructions for communications tools:
  - Use of office telephone – advance features
  - Setting up voice mail
  - Use of fax machine, printers, copy machine and other devices
  
- ✓ Other items as instructed by supervisor:
  - \_\_\_\_\_
  - \_\_\_\_\_

## Phase III: Your New Employee's First Week

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During the first week, the employee is most likely not yet confident but should be more familiar with his or her role and the University. Believe it or not, many new employees complain their first week is boring, so check in often with them.

### Review what's occurred:

- ✓ At the end of the first week, confirm the new employee has shadowed the designated colleague.

### Do:

- ✓ Check in often with the new employee – don't wait for a new employee to come to you. (They generally will not for fear of looking incompetent).
- ✓ Begin inviting the new employee to key meetings.
- ✓ Create opportunities for the employee to interact with other employees and understand University culture.
- ✓ Encourage other colleagues to invite the new employee to partake in campus activities.
- ✓ If the new hire has direct reports, set up meetings with them and their support staff.
- ✓ Schedule one-on-one meetings for the new hire to meet with other colleagues he/she will be working closely with. These meetings can occur throughout the first month.
- ✓ Invite new employee to join you for lunch. Invite other team members, and reinforce the message that the new employee's contributions will be appreciated.

### Discuss:

- ✓ Conduct first week meeting with new employee.

### Plan for Next Phase – Month One:

- ✓ Determine the Job- and Department- Specific Learning Activities the new employee will complete during the first month (see chart on page 6).

### Notes:



## First-Week Meeting with New Employee

Towards the end of the first week, meet with the new employee to discuss the following:

- ✓ Feedback from the shadowing sessions with departmental colleague(s).
- ✓ Your initial (informal) feedback on the new employee's performance to date
  - **Tip:** It's never too early to provide feedback. Until then, a new employee is uncertain of their actions.
- ✓ The new employee's feedback on his or her direct reports (if applicable).
- ✓ The process for the new employee to request time off.
- ✓ The travel and expense reimbursement process (if applicable).
- ✓ Foreseeable challenges the new employee may encounter and how to overcome them.
- ✓ Your communication style – whether you prefer email versus phone, an open door versus scheduled meetings – and how your styles can work together.
- ✓ Your approach to time management, and what the employee can do to make better use of his or her time.
- ✓ The employee's schedule of activities for month one, including:
  - Applicable training dates
  - Job- and Department- Specific Learning Activities chart (page 6)
- ✓ Your schedule for the month and the best time and method to reach you.
- ✓ Any additional questions the employee might have.

### Notes:

## Phase IV: Your New Employee's First Month

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The employee should be feeling more comfortable now and ready to take on more responsibility; he or she is eager to demonstrate that you made the right hiring decision.

### Review what's occurred:

#### Do:

- ✓ Continue to check in at least once a week; encourage the new employee to share any frustrations.
  - **Tip:** A check in can occur in person or over the phone if you are traveling.
- ✓ Begin to create a development plan for employee

#### Discuss:

- ✓ Conduct first month meeting with new employee.

#### Plan for Next Phase – Future Actions:

- ✓ Determine the Job- and Department- Specific Learning Activities the new employee will complete in the future (see chart on page 6).

#### Notes:



## First-Month Meeting with New Employee

Towards the end of the first month, meet with the new employee to discuss the following:

- ✓ How you feel the employee is performing, using page 15.
- ✓ What is most important to you as far as your employee's work objectives?
- ✓ ITS' strategic plans, as well as key initiatives in your area.
- ✓ The core elements of a performance evaluation:
  - The department's performance evaluation process and cycle, and the criteria and evaluation form that will be used to evaluate the new employee's performance.
- ✓ The employee's career goals:
  - Create a development plan.
- ✓ What the employee should do if he/she has a conflict with another employee.
- ✓ New ideas the employee may have. Give them a chance to integrate, and then capture their ideas NOW. Don't wait until they forget what they did on their old job and become too much a part of the system.
- ✓ The employee's schedule of activities for the future, including:
  - Applicable training dates
  - Job- and Department- Specific Learning Activities chart (page 6)
- ✓ Any additional questions the employee might have.

### Notes:

## Employee Training and Development Plan

Your employee's training and development can take on many shapes and forms, from:

- Informal on-the-job training.
- Formal classroom and online training.
- University-sponsored education opportunities, including tuition reimbursement.

Even if it is informal, you and your employee should create a development plan by:

- ✓ Breaking down your employee's job by task and the necessary skills.
- ✓ Determining how well-developed are his or her skills.
- ✓ If a gap exists between the necessary skills and the employee's skills, discuss potential training and educational assistance to address it.
- ✓ Create a development plan, including milestones, to help address development.

## How Am I Doing?

Although you and your new employee will have regular performance discussions and his/her performance will be formally reviewed on an annual basis, it's good to periodically provide input regarding how you feel he/she is performing.

Your first impression of new employee: \_\_\_\_\_

\_\_\_\_\_

How you feel about new employee's performance to date: \_\_\_\_\_

\_\_\_\_\_

New employee's strengths: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

New employee's areas for improvement: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Action steps new employee can take to improve (books, training, etc.):

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_





## Phase V: Your New Employee's Future Actions

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Your new employee's orientation and learning does not end after the first month.

### Review what's occurred

- ✓ Discuss the employee's feedback on New Employee Orientation

### Do:

- ✓ Conduct Performance Evaluation review for new employees before the end of the 6-month probationary period
- ✓ Continue to check in at least once a week; encourage the new employee to share any frustrations

### Discuss:

- ✓ Conduct a formal check-in meeting with the new employee

### Notes:



## Check-In Meeting

A check-in meeting is designed to more quickly address issues. An employee problem usually becomes unsolvable when it goes on for too long without intervention.

**Tip:** Don't schedule it too soon. Allow the employee a chance to formulate opinions, questions, and concerns.

During it, you should probe:

- ✓ Does the employee adequately understand his or her role?
- ✓ Is this the job he or she expected? Is there "buyers" remorse?
  - If the job is not what was expected, what can be done?
- ✓ What ideas does the new employee have to improve the area and/or department?
- ✓ Is the employee having trouble fitting in or having difficulty with another employee or area?
  - What can be done to resolve it?
- ✓ Does the new employee see a career path?
  - How can you help that materialize?

### Notes:



# New Employee Orientation Checklist

## For Office/Service and Managerial/Professional Staff

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_____ Supervisor	_____ New Employee
_____ Supervisor Title	_____ Employee Title

The following checklist provides a structure for giving a new employee their first detailed view of the workplace. Once all items have been discussed and the checklist completed, the supervisor can be reasonably assured that the employee has received important information needed to be successful on the job.

Each supervisor is responsible for the completion of the checklist; however, all individuals in the department share the responsibility for orienting new employees. Supervisors have the flexibility to decide the best way for the new employee to receive the required information. Some information may need to be provided by ITS HR or other areas.

As each activity is completed, check the relevant box and indicate the date. At the end of the orientation, your signature coupled with the employee's signature will verify completion of the program. The document can then be filed in the department file.

**Pre-Employment Review (Complete prior to the first day of work)**

- Explain job duties and responsibilities
- Review classification and wage offered
- Special uniforms, tools and equipment required
- Briefly explain staff benefits and answer questions
- To who to report (name) \_\_\_\_\_
- When to report for work (date and time) \_\_\_\_\_
- Where to report for work (place) \_\_\_\_\_
- Campus directions and parking facilities
- Schedule University-wide New Employee Orientation
- Schedule other training (as applicable)

**First Day of Work (An introduction to the work environment)**

Date \_\_\_\_\_

- Welcome – introduce yourself
- Department/area facts fit within the University, organizational structure, key staff and areas of responsibility
- The job: review overall duties and provide copy of job description
- On-the-job training plan: cover information and training necessary to become fully competent
- Work assignment
- Designate a person to whom new employee can go for on-the-job help
- Work week: normal hours and overtime (if applicable)
- Time cards: how to fill out and where to keep (if applicable)
- Rest breaks and meal period
- Attendance expectations: advance notice and policy for reporting absences or tardiness

- Pay policy: present wage and opportunities for raises
- Obtain parking permit and NU ID
- Pay periods: regular schedule and when the first paycheck will be received
- Working together: Review behavior expectations for working with other staff
- Introduce to immediate work group
- Departmental facilities: restrooms, break rooms and bulletin board and/or information center
- Tour of work area: show equipment used and layout of local work area
- Explain telephone procedures and cell phone policy
- Smoking rules: designated smoking areas
- Housekeeping: local area responsibilities
- First aid and injuries: who to notify and how to secure assistance
- Safety: rules and regulations of department for fire, evacuation and other emergencies

**30 Day Follow-Up Interview - Review**

- Job and training matters
- Departmental policies and rules
- Miscellaneous matters
- Critique the entire orientation program
- Complete 30-day review regarding performance feedback to date

**60- and 90- Day Follow-Up Interview - Review**

- Give performance feedback to date

**End of Probationary Period Interview**

- Before the end of the 6 month probationary period, determine if the employee has successfully completed the probationary period (contact ITS HR with questions)
- Conduct performance feedback session using department form

**Annual Performance Evaluation**

- Conduct annual performance evaluation using department form

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Supervisor Signature

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Date

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Employee Signature

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Date