

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 employee and confirm the details for their first day. Human Resources will email your new hire information to prepare for their first day in your department.		
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.		
Encourage team members to send new employee a welcome email.		
Set up new employee's work area (as applicable): <ul style="list-style-type: none"> ✓ 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: <ul style="list-style-type: none"> ✓ Develop a training plan. Arrange for a buddy, or mentor if appropriate ✓ Identify and schedule any training to be completed in the 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: <ul style="list-style-type: none"> ✓ 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 currently report direct 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 buddy/mentor.		
Provide a tour of work area, department, building, and other key points of interest in the work location, including: <ul style="list-style-type: none"> ✓ The break room/restroom ✓ Where an employee can store coat/belongings ✓ Cafeteria/dining halls/vending/other onsite services ✓ Appropriate timeclock for swiping (if applicable) 		
Have employee initialize account through IT website. Employee will need URID.		
Help employee obtain ID badge through the ID Office either on campus or at the medical center.		
Have employee login to HRMS. Provide navigation to Self Service and review Time Reporting, View Paycheck, Vacation Balance, or other important and/or applicable links		
Assist employee in getting parking permit (if applicable).		
Direct employee to Total Rewards website, including contact information, to choose and enroll in benefits.		
Assist with logging into MyPath and review required training modules and deadlines.		
WEEK 1 – 2		
Review department policies and procedures: <ul style="list-style-type: none"> ✓ Job schedule and lunch/break schedule ✓ Dress code ✓ Emergency and safety protocols ✓ Time reporting/payroll ✓ Call in procedures ✓ Vacation scheduling ✓ Overtime policy ✓ Review any other relevant *URMC/University policies and procedures 		
Orient employee to Department/Division/Work Unit: <ul style="list-style-type: none"> ✓ Discuss department goals and priorities ✓ Explain how employee’s work and co-workers’ work contributes to department’s goals and priorities ✓ Provide departmental phone list and organizational chart 		

<ul style="list-style-type: none"> ✓ Review current department programs ✓ Review department specific policies, discuss department resources 		
<p>Review functional job descriptions and on-boarding training plan:</p> <ul style="list-style-type: none"> ✓ Review Job specific training requirements and training schedule ✓ Develop goals (specific, measurable, achievable, relevant and time-bound = SMART) for both training and for performance ✓ Explain how performance will be evaluated during the probationary period ✓ Schedule regular 1:1's to allow for feedback and questions 		
<p>Explain the department's mission, vision statements and goals. Also explain the new employee's role in fulfilling the mission, vision and goals for the organization.</p>		
<p>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.</p>		
<p>Explain how to use email, Intranet*, and voicemail. Share appropriate email signature template.</p>		
<p>Discuss initial assignments and training plan, department goals and objectives.</p>		
<p>Review Performance Management Program, including the Annual Performance Review and the wage and salary program.</p>		
<p>Allow time to complete required training in MyPath.</p>		
<p>Schedule a meeting at the end of the first week to check in with the new employee.</p>		

MONTHS 1-2

<p>Meet regularly at 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. Click here for recommended conversation starters at the 30, 60, and 90-day milestones.</p>		
<p>Ensure new employee understands the relationship between their job, the department and the organization.</p>		
<p>On a regular basis, recognize accomplishments and demonstration of critical behaviors to date.</p>		
<p>Share team employee engagement results and any applicable team action plan.</p>		
<p>*Discuss the employees' role in process improvement which supports the ICARE value of Excellence; complete the "Lean Overview" training module in MyPath.</p>		

Review Mandatory In-Service Training requirements and timelines.		
REMAINDER OF INITIAL ONBOARDING PERIOD		
<p>Month 3 (non-exempt) Month 6 (exempt):</p> <p>Recommended best practice to hold formal performance discussion to evaluate progress during introductory period. Involve HR Business Partner if there are performance concerns.</p>		
Continue Regular 1:1 meetings and recognition efforts.		
Support efforts to introduce employee to other colleagues and establish relationships throughout the organization.		
<p>Month 5 (non-exempt) Month 11 (exempt):</p> <p>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 Performance Review in MyPath.</p>		
<p>Month 6 (non-exempt) Month 12 (exempt):</p> <p>Deliver end of probation performance review. Evaluate whether employee qualifies for an end of probation compensation increase per the wage and salary program.</p>		