NEW EMPLOYEE ONBOARDING
A guide for new employees and their managers

BEFORE THE EMPLOYEE’S START DATE

Outcomes: This is a welcoming work environment with informed colleagues and a fully-equipped work space; new employees feel “settled in” on their first day.

Schedule and Job Duties

☐ Call employee:
  ○ Express welcome & anticipation for their start date
  ○ Confirm start date, time, place, parking, dress code, etc.

☐ Add regularly scheduled meetings (e.g. staff and department) to employee’s calendar.

☐ Prepare employee’s calendar for the first two weeks.

Socialization

☐ Email department/team/functional area of the new hire. Include start date and employee’s role.

☐ Set up meetings with critical people for the employee’s first few weeks.

☐ Arrange for lunch with the appropriate person(s) for the first day and during first week.

☐ Contact the office of Orientation & New Student Programs to schedule a campus tour.

Work Environment

☐ Put together welcome packet from the department and include: job description, welcome letter, contact names and phone lists, etc.

☐ Clean the work area and set up cube/office space with supplies.

☐ Order office or work area keys through the UHCL Police Department.

☐ Add employee to relevant email lists.

Technology Access and Related

☐ Order technology equipment (computer, printer, etc.) and software if necessary.

☐ Arrange for access to common drives, any role-specific software, and coordinate PeopleSoft role authorizations through payroll.

☐ Arrange for phone installation/update.

Training/Development

☐ Confirm tentative NEOP date with Human Resources.

☐ Arrange pertinent trainings required for the job if necessary.
FIRST DAY

Outcomes: The employee feels welcomed and prepared to start working; begins to understand the position and performance expectations.

Schedule, Job Duties, and Expectations

☐ Clarify the first week’s schedule and confirm required and recommended training.
☐ Provide an overview of the functional area – its purpose, organizational structure, and goals.
☐ Review job description, outline of duties, and expectations.
☐ Describe how employee’s job fits in the department, and how the job and department contribute to the division and the university.
☐ Review hours of work. Explain policies and procedures for overtime, use of vacation and sick time, holidays, etc. Explain any flexible work policies or procedures.

Socialization

☐ Be available to greet the employee on the first day.
☐ Introduce employee to others in the workplace.
☐ Take employee out to lunch or host in the department.

Work Environment

☐ Show employee the eServices PASS System.
☐ For non-exempts, show the new employee how to clock in and out.
☐ If the employee will be a TRAM approver, arrange for proper approval access through payroll.
☐ Arrange for employee to retrieve any office keys from UHCL PD and ensure they received their employee ID card from Human Resources.
☐ Discuss transportation and remind employee to purchase parking permit.
☐ Provide department or building-specific safety and emergency information.
☐ Take employee on an office/building tour.
☐ Explain how to get additional supplies.

Technology Access and Related

☐ Provide information on setting up voicemail.
☐ Provide UHCL Branding guidelines for signatures and documentation.
NEW EMPLOYEE ONBOARDING
A guide for new employees and their managers

FIRST WEEK
Outcomes: New employee builds knowledge of internal processes and performance expectations; feels settled into the new work environment.

Schedule, Job Duties, and Expectations
- Give employee their initial assignment. (Make it something small and doable.)
- Debrief with employee after they attend initial meetings, attend training, and begin work on initial assignment. Also touch base quickly each day.
- Provide additional contextual information about the department and organization to increase understanding of the purpose, goals, and initiatives.
- Explain the annual performance review and goal-setting process.
- Review the process related to the probationary period.

Socialization
- Arrange for a personal welcome from the unit leader.

Technology Access and Related
- Ensure employee has fully functioning computer and systems access and understands how to use them.
- Show employee the UCT Website so they can explore available services and support options.
- Order business cards and name plate.

FIRST MONTH
Outcomes: Employee is cognizant of their performance relative to the position and expectations; continues to develop, learn about the organization, and build relationships.

Schedule, Job Duties, and Expectations
- Schedule and conduct regularly occurring one-on-one meetings.
- Continue to provide timely, ongoing, meaningful “everyday feedback.”
- Elicit feedback from the employee and be available to answer questions.
- Explain the performance management process and compensation system.
- Set performance and professional development goals.

Socialization
- Continue introducing employee to key people and bring them to relevant events.
- Arrange for employee to take a campus tour (if not already completed).

Training and Development
- Ensure employee has received invitation for Human Resources New Employee Orientation.
- Ensure employee is signed up for necessary training.
NEW EMPLOYEE ONBOARDING
A guide for new employees and their managers

FIRST THREE MONTHS
Outcomes: Employee is becoming fully aware of their role and responsibilities, beginning to work independently and produce meaningful work. They continue to feel acclimated to the environment, both functionally and socially.

Schedule, Job Duties, and Expectations
- Continue having regularly occurring one-on-one meetings.
- Meet for informal three-month performance check-in.
- Continue giving employee assignments that are challenging yet doable.
- Discuss appropriate flexible work options.

Socialization
- Have employee “shadow” you at meetings to get exposure to others and learn more about the department and organization.
- Have a check-in with the employee and buddy.
- Take employee out to lunch (or host in your department), and have informal conversation about how things are going.

Training and Development
- Ensure employee attended a New Employee Orientation session.
- Ask if needed training is completed.
- Provide information regarding ongoing Training & Development opportunities through Human Resources, USA, CE, etc.

FIRST SIX MONTHS
Outcomes: Employee has gained momentum in producing deliverables, has begun to take the lead on some initiatives, and has built some relationships with peers as go-to partners. Employee feels confident and is engaged in new role while continuing to learn.

Schedule, Job Duties, and Expectations
- Conduct six-month performance review.
- Review progress on performance goals and professional development goals.

Socialization
- Create an opportunity for employee to attend or be involved in an activity outside of his/her work area.
- Meet with employee and buddy at the end of their structured buddy-relationship. Discuss how things went and what else would be helpful for the employee.