

Supervisor's Guide to Effectively Onboarding a New Employee

Modified from:



Using this Guide

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 have an increased level of responsibility, Seek the assistance of other people in the onboarding process, as proper onboarding of new employees supports the entire organization.

The New Employee Onboarding Process

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

Phase	Objectives	Sample New Employee Activities
I. Hiring Process	<ul style="list-style-type: none"> • Meet best practices for hiring • Clearly communicate the professional relationship • Craft the applicant’s impressions of the Organization and prepares applicant for employment 	<ul style="list-style-type: none"> • Issue Offer Letter with salary/hourly Rates, include if Part-time or Full-Time • Benefit information (include vacation, horse boarding, education, health, etc) • Receive signed position description • Work hours & location • First day to report • At-will or not at-will state • Hiring dependent on passing drug screen • Any other requirements (i.e. not work in same business within 100 miles) ❖ Get signature of acceptance of offer
II. Preparing for First Day	<ul style="list-style-type: none"> • Set objectives for first day • Set tone for relationship between employee and organization • Ease normal anxiety for first day 	<ul style="list-style-type: none"> • Supervisor calls employee and welcomes employee • Reviews dress code for first day and “usual” attire • Tells employee of expected work hours • Tells employee about lunch protocol (i.e. everyone brings lunch, goes out, etc.) • Answers employee questions relevant to first day • Send employee manual or provide hard copy • Employer assigns workspace • Employer prepares workspace (i.e. computer, desk, provides supplies etc)
III. First Day Part I	<ul style="list-style-type: none"> • Welcome the employee! A day of discovery, administration and introductions • Complete administrative requirements. 	<ul style="list-style-type: none"> • Meets with staff person who handles to new hire paperwork and completes same • Completes administrative forms such as direct deposit, emergency contact etc. • Reviews information about Benefits and provide forms. • Tours department and workspace, assigned workspace. • Meets with supervisor.

		<ul style="list-style-type: none"> • Shadows a colleague and on-the- job training. • Consider having a welcome pot-luck lunch, tell employee prior, this works as a “getting to know you” lunch
II. First Day Part 2	.	<ul style="list-style-type: none"> • Meets with a representative of all areas to learn their functions. • Learns more about Org, the level of this depends on the “level” of the employee • Immerses in Organization culture.
III. First Week	Help the employee get acquainted with the Organization and with his or her new role.	<ul style="list-style-type: none"> • Meets with supervisor and creates development plan. • Provide blank template for 90 day performance review
IV. First Month	The employee becomes a productive member of the Organization family.	<ul style="list-style-type: none"> • Attends any formal training. • Hold check-in meeting/s at least 1x per week. • 30-, 60-, and 90- day performance reviews and annual evaluation. • Ask what the employee needs, what did s/he wish she had learned in first day/week
V. Future Actions	The employee continues his or her orientation. Onboarding is an ongoing learning process.	<ul style="list-style-type: none"> • Get suggestions on how to improve onboarding process

Your Role and Others

Role	Responsibilities
Supervisor / Department Orientation Contact or Designate Trainer	<ul style="list-style-type: none"> • Preparing workspace • Introduction to colleagues • Departmental procedures • Job expectations • Job specific training • Ensuring completion of required training (Supervise for Success) • Evaluation process • Conducting 90-day evaluation
HR Function	<ul style="list-style-type: none"> • Administrative information • Compliance • Benefits • Payroll • Set up personnel file (Meets PATH Standards) • Provide keys, passwords, passcodes, etc. • Submit employment verification/ tax documents

***Your Role versus Your Department Orientation Contact or Mentor**

You may choose to have an Orientation Contact or Mentor. 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 the Orientation Contact/Mentor
- Include this new role into the performance evaluation of the Orientation Contact/Mentor

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

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 your department (or make an announcement in a staff meeting) informing them of the new employee; provide background of the person's skills and experience, as well as start date and agenda.
- Send an email to the group affected by the new hire; i.e. volunteers if the new hire is the Volunteer Coordinator, participants if the new hire is an instructor, etc.
- Create a folder for the employee where you can keep specific information to give them, as well as information about them.
- Brush up on the Organization's policies and benefits; they may have changed since you last hired someone or if you have not been in charge of hiring. Schedule time with your supervisor to review, if necessary.
- 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 morning 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 organization and for all employees.
2. Department-specific information.
3. Job-specific information.

Generic information is accounted for in the *Employee, Participant, and Volunteer Handbooks*

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 department
- Meeting colleagues in other departments with whom the new employee 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 Dept Orientation Contact		
Day One				
Day One				
Week One	Shadow a colleague in your department.			
Week One	Review manuals and other documented procedures.			
Week One	Available tools, resources and information.			
Week One	Emergency response training			
Week One				
Month One	Attend trainings (i.e. all volunteer trainings)			
Month One	Coaching with your supervisor and/or others.			
Month One	Meeting colleagues in other departments.			
Month One	Other training, either classroom or online.			
Month One	Employee Development Plan.			
Month One				
Future Actions	Supervisory training.			
Future Actions	Advanced safety training.			
Future Actions				
Future Actions				

Phase II: Your New Employee's First Day

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 activities have been completed successfully.

Do:

- Upon arriving, introduce new employee to Orientation Contact/Mentor 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 7).
- 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 department 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 and who supports the department.
- The new employee's work hours, the department's office hours, lunch hour, break times and overtime policy/procedure (if applicable).
- Departmental dress code and any other department-specific policies.
- Who to call when ill or late reporting to work, including necessary forms.
- Emergency procedures, emergency exits, emergency safe areas
- The employee's schedule of activities for week one, including:
 - Job- and Department- Specific Learning Activities from chart (page 7).
- 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. You are modeling the behavior that you want the new employee to replicate. Consider the impact of the following actions on a new employee:

- Being late for your meeting with the new employee
- Unprofessional dress
- Airing "dirty laundry" about a customer, employee, board member, volunteer, etc.
- Using cell phone for personal calls
- Making copies of personal documents
- Other unprofessional behaviors that would not be approved or reflect poorly

Notes:

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Department Orientation

On the first day, a new employee will need:

- Employee workspace:
 - Phone
 - Personal computer and printer (if applicable)
 - Workspace
 - Supplies
 - Name tag

- Department tour:
 - Location of break rooms and restrooms
 - Expectations for taking breaks and lunch are communicated

- Instructions for communications tools:
 - Use of office telephone – advanced features
 - Setting up voice mail and the recommended outgoing greeting (if applicable).
 - Use of fax machine, printers, copy machine and other devices.

- Other items as instructed by supervisor:
 - _____
 - _____

Phase III: Your New Employee's First Week

During the first week, the employee is most likely not yet confident but should be more familiar with his or her role and the Organization. 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 others employees and understand Organization culture.
- Encourage other colleagues to invite the new employee to observe in Organizational activities and services, when appropriate..
- 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 departmental and other colleagues he/she will be working closely with. These meetings can occur throughout the first month.
- Invite the 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 page 7).

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 department 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.
- Discuss the observations of the new employee; s/he brings a new perspective, and this can be a valuable tool in improving the Organization
- The new employee's feedback on his or her direct reports (if applicable).
- The department's staff meeting schedule (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
 - Internal calendar for the year; events, are they mandatory, etc.
 - Job- and Department- Specific Learning Activities from chart (page 7)
- 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

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:

- Complete employee's 60- and 90- day performance reviews (if applicable)
- Determine the Job- and Department- Specific Learning Activities the new employee will complete in the future (see page 7).

Notes:

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First-Month Meeting with New Employee

Toward the end of the first month, meet with the new employee and 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?
- Organizations and the department's strategic plans, as well as key initiatives in the employee's 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.
- Rewards and recognition opportunities and how to apply.
- 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 from chart (page 7)
- Any additional questions the employee might have.

Notes:

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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.
- Organization-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

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 Employment Evaluation review for new employee before the end of the ninety calendar days.
- 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:

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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 "buyer's" remorse?
 - If the job is not what was expected, what can be done?
- What ideas does the new employee have to improve the department and/or Organization?
- Is the employee having trouble fitting in or having difficulty with another employee or department?
 - What can be done to resolve it?
- Does the new employee see a career path?
 - How can you help that materialize?

Notes:

Organization

New Employee Orientation Checklist For Clerical/Service and Administrative/Professional Staff

_____	_____
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 the business office 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 whom to report (name)_____.
- When to report for work (date and time)_____.
- Where to report for work (place)_____.

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

- Welcome - introduce yourself.
- Department/division facts fit within Organization, 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.
- Performance management: review system.
- Provide Employee Handbook
- Equal opportunity - no discrimination because of religion, color, sex, age, national origin or ancestry, genetic information, marital status, parental status, sexual orientation, gender identity and expression, disability, or status as a veteran.
- 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: department rules and facilities available.
- Attendance expectations: advance notice and policy for reporting absences or tardiness.
- Pay policy: present wage and opportunities for raises.
- Pay periods: regular schedule and when the first paycheck will be received.
- Payroll records: Include all deductions on first paycheck.
- Handouts: pamphlets and forms from new employee packet (group insurance, etc.)
- Anti-harassment and violence in the workplace policies: emphasize zero tolerance.
- Working together: Review behavior expectations for working with other staff.
- Introduce to immediate work group.
- Departmental facilities: parking, rest rooms, refreshment facilities and bulletin board.
- 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.

First Pay Day - Give first paycheck

- Period covered, wage rate and next pay date.
- Deductions required by law (a) federal withholding income tax; (b) Social Security; (c) State income tax; and (d) county option tax (if applicable).
- Employee paycheck deductions (as appropriate) - group life insurance, group medical insurance, short/long term disability insurance, U.S. savings bonds, credit union, , personal accident insurance, flexible spending accounts, etc.

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 Interviews

- Give performance feedback to date

End 90 days Interview

- Before the 90th calendar day of employment, determine if the employee has successfully completed the expectations; if not, reflect as to why not and consider if the employee is an appropriate match for the Organization's needs

6 month Performance Feedback

- Conduct a performance feedback session using department form.

Annual Performance Evaluation

- Conduct annual performance evaluation using department form.

Supervisor Signature

Date

Employee Signature

Date