



New Employee Onboarding

A guide for managers of new employees

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A GUIDE FOR MANAGERS



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ONBOARDING: WHAT IT IS AND WHAT ISN'T IT?

Imagine what it would feel like to arrive at your new job and there is no one to greet you, no one to show you around, no one to introduce you to others, no one to help you understand how your new position fits into the department and University. How long would you be sure you made a good decision in joining this new organization?

According to recent data, more than 25 percent of the U.S. population experiences some type of career transition each year. Unfortunately, many transitions are not successful. According to the Society of Human Resources Management (SHRM), half of all hourly workers leave new jobs in the first four months, and half of outside hires fail within 18 months. Clearly, there is room for improvement.

An important way we can combat these challenges is to implement an employee Onboarding Process.

Onboarding is not a new employee attending the New Hire Orientation or Benefits class; nor is it any other HR-sponsored event, class, or program.

Onboarding is a process that lasts several months in which the HR partners with the hiring manager to provide a strong foundation that will enable our new employees achieve success in their new job. It is a responsibility of the Hiring Manager because it takes place ***on the job***. It helps new hires adjust to the social and performance aspects of their jobs so they can more quickly become productive, contributing members of the organization.

Consider the following differences between Orientation and Onboarding:

Differentiators	Orientation	Onboarding
Time	Single event	Several months to a year
Delivery	Classroom style	Scalable, requires 2-way feed of information
Message	Need-to-Know information	Customized information based on role
Results	Still considered "new" and rely on the assistance of their managers and colleagues	Strengthens new employees' connection with their role and the company Fully integrates new employees and gets them productive faster





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Because Onboarding is so important to retaining new employees and employee satisfaction, we are offering the following Onboarding Process (and tools) to assist Hiring Managers once their new employee has been selected. That is when the *real* Onboarding Process begins.

First, let's take a look at the Roles and Responsibilities of HR and the Hiring Manager regarding new hire employees.

Human Resources Responsibilities

Once you have selected your candidate and you have checked references, HR will:

- ✓ 1. Call the candidate to make the offer pending a clear background check.
- ✓ 2. Schedule when new employee will begin work; **HR will advise the Hiring Manager of the start date.**
- ✓ 3. Schedule the new employee to complete online paperwork and to come to the HR offices to complete notary paperwork which is sent to Stillwater. Once the new employee has been entered into the HR Information System, the Banner ID will be assigned. The new employee will receive an email to their personal email account in 3-5 days from completing payroll paperwork advising them to set up their OSU/OKEY email account.
- ✓ 4. Email offer and paperwork details to the new employee and copy manager.
- ✓ 5. Schedule new employee for New Employee Orientation (which includes Benefits information). HR will email the new employee and copy the manager a week prior to their scheduled NEO date.

When Human Resources advises you that your candidate has accepted the offer and the date he/she will begin work, the Role and Responsibilities of the Hiring Manager should be started:

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.*

Hiring Managers' Role and Responsibilities

Schedule and Job Duties

- ☐ Make a note on your calendar to call/email new employee 2-3 days before start date:
 - Confirm start date, time, place, parking, dress code, etc.
 - Who to ask for when he/she/they arrive on Day 1 - if you can not be present please have someone assigned to onboard for Day 1
 - Tell them you are pleased and excited about their arrival



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- ☐ Add regularly scheduled meetings (e.g. staff and department) to employee's calendar.
- ☐ Prepare employee's calendar for the first two weeks.
- ☐ Plan the employee's first assignment.

Socialization

- ☐ Email department/team/functional area of the new hire. Include start date, employee's role, and bio. Copy the new employee, if appropriate.
- ☐ Select a buddy. (See Buddy Guidelines)
- ☐ Meet with the buddy, and provide suggestions and tips. (See Buddy Guidelines)
- ☐ Set up meetings with critical people for the employee's first few weeks.
- ☐ Arrange for lunch with the appropriate person(s) or buddy for the first day and during first week.

Work Environment

- ☐ Put together welcome packet from the department and include: job description, welcome letter, career path, contact names and phone lists, campus map, parking, mission and values, information on your unit/school, etc.
- ☐ Arrange for the work area to be cleaned and set up with supplies.
- ☐ Order office or work area keys.
- ☐ Order business cards and name plate, if appropriate.

Technology Access and Related (email chs.helpdesk@okstate.edu)

- ☐ Order technology equipment (computer, printer, iPad) and software, if necessary.
- ☐ Contact local IT to have the system set up in advance.
- ☐ Arrange for access to common drives (IT).
- ☐ Arrange for phone installation with IT.
- ☐ Ensure information on the phone system and setting up voicemail is available at work area.

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. (HR New Hire Orientation and Benefits)



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- ☐ Schedule an immunization/vaccine review appointment for the new hire with the Occupational Health Nurse by calling 918-561-1256.
- ☐ Provide an overview of the functional area – its purpose, organizational structure, and goals.
- ☐ Review job description, outline of duties.
- ☐ Describe how employee's job fits in the department, and how the job and department contribute to OSU-CHS/OSU-Tulsa goals.
- ☐ 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 (critical)
- ☐ Introduce employee to others in the workplace; don't worry about introducing him/her to everyone – it is a bit overwhelming and they won't remember everyone's name anyway. Stick to introducing just the folks in your department. Others can come later.
- ☐ Introduce employee to his/her buddy, if one has been selected.
- ☐ Go to lunch with new employee, or ask someone else to, if necessary; ensure they don't have to sit alone on first day, if possible.

Work Environment

- ☐ Give employee key(s); advice how to access building until new employee has own badge.
- ☐ Show employee how to track time or leave or assign someone to do this.
- ☐ Discuss campus parking; ensure new employee has parking sticker, if appropriate.
- ☐ Provide department or building-specific safety and emergency information. (Contact Safety)
- ☐ Take employee on a campus tour.
- ☐ Explain how to get additional supplies.
- ☐ Add employee to relevant email lists as soon as Okstate email has been set up. (email CHS.helpdesk@okstate.edu or helpdesk@okstate.edu)

Training/Development

- ☐ Determine when employee is scheduled to attend New Employee Orientation session. (He/she /they will get an email from HR with the date listed in it.)
- ☐ Arrange additional pertinent trainings required for the job such as:
 - HIPAA, FERPA, Safety (employee will receive email from Healthstream)
 - Blood Borne Pathogen (manager will direct employee to training)
 - Title IX (employee will receive email from Healthstream)
 - Safety (specific needs to be determined by Manager)



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- Service Excellence (clinic employees only; employee will be enrolled in next available session by HR and manager copied on email reminder)

Technology Access and Related

- ☐ Double-check to ensure information on setting up voicemail and computer on new employee's desk.

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 his/her initial assignment. (Make it something small and doable.)
- ☐ Debrief with employee after he/she attends initial meetings, attends training, and begins 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, and value add to OSU, goals, and initiatives.
- ☐ Review the process related to the probationary period.
- ☐ One of the most important responsibilities a Hiring Manager has, but often has difficulty articulating, is to tell the new employee what your expectations are in terms of time spent at work, integrity, ethics, assigned projects, interpersonal skills used in the department, taking time off, teamwork, communication, conflict resolution, etc.

Socialization

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

Technology Access and Related

- ☐ Check in with new employee to ensure he/she has fully functioning computer and systems access and understands how to use them.



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FIRST MONTH

Outcomes: *Employee is cognizant of his/her 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, on-going, meaningful “everyday feedback.”
- ☐ Elicit feedback from the employee and be available to answer questions.
- ☐ Explain the performance management process and compensation system.
- ☐ Discuss performance and professional development goals. Give employee an additional assignment.

Socialization

- ☐ Continue introducing employee to key people and bring him/her to relevant events.
- ☐ Meet with employee and buddy to review first weeks and answer questions.

Training and Development

- ☐ Ensure employee has attended Human Resources New Employee Orientation and Benefits training.
- ☐ Ensure employee is signed up for any other necessary training.