



EVER

UPWARD

Onboarding Toolkit

For WSU Supervisors

Human Resources | Office of Workplace Learning

Weber State University

Dear Supervisor,

Congratulations on the successful hire of your new employee! We look forward to partnering with you in their onboarding process.

This is an exciting time for you and your new employee! And the hiring step is just the beginning. The first 90 days to six months with your employee is critical. Research shows that early experiences with the WSU community and culture will determine the longevity and productivity of your new employee. By providing a positive onboarding experience, you ensure that your employee feels welcomed, supported, and equipped to succeed in their new role. The steps provided create a stronger team and greater impact by your department.

This Toolkit provides a brief description of onboarding, a checklist for you to follow over the next several months, and suggestions on how to develop and maintain a strong professional relationship with your employee. It is our goal to help you, your new employee, and your department experience great success here at WSU.

Feel free to reach out to us anytime for assistance.

Happy Onboarding!

Office of Workplace Learning (OWL)

WHAT IS ONBOARDING?

- * Ensures new employees feel welcome, engaged and inspired, and are reminded of why they chose this position, your department, and Weber State University.
- * Creates opportunities for new employees to connect to personal relationships, information networks, and the legacy of the “Weber Way”.
- * Brings your newly hired team member up to speed with the policies, processes, cultures, expectations, and day-to-day responsibilities of your office and department.

WHY IS ONBOARDING IMPORTANT?

- * Builds the reputation of WSU and your department of being a great employer to work for by providing excellent training, clear leadership, and a strong community organization.
- * Helps retain your team members which reduces high turnover costs.
- * Increases staff engagement and productivity.
- * Builds a strong, cohesive team, and fosters collaboration.

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ONBOARDING OVERVIEW

Our onboarding process follows our core themes of Learning (Launch), Access (Orient), and Community (Connect). This overview is laid out in detail in the following pages of this toolkit.

	WSU PARTNERS	NEW EMPLOYEE	SUPERVISOR	
LAUNCH	HIRE	HR approves new hire in People Admin & initiates hiring process Benefits overview sent	After conditional offer of employment, complete background check with HR	Send conditional offer of employment based on background check Initiate steps to follow the checklists in this Onboarding toolkit
	PRE-START	HR initiates Benefit enrollment HR sets up Direct Deposit	Review and enroll in Benefits Works with HR to complete I-9 Make note of details and logistics regarding first day	Send welcome email with details and logistics of first day Prepare work area for successful start Assign a point of contact to assist in onboarding
ORIENT	FIRST DAY	HR finalizes Benefit enrollment HR sends new hire packet to Payroll to finish ePAR	Meet with HR to finalize new hire paperwork Review and begin the New Employee Checklist	Make introductions & plan a welcome activity Connect with mentor/point of contact Check in throughout the day to see how things are going
	FIRST 30-90 DAYS	Complete any outstanding HR tasks left for hiring process Attend Welcome Orientation, New Employee trainings, and any additional trainings as directed by department Familiarize yourself with office, department, and campus	Ensure employee knows who to contact for information Check-in regarding their New Employee Checklist to make sure onboarding tasks are completed Provide itinerary of initial job responsibilities Begin Probationary PREP process	
CONNECT	FIRST 90 DAYS TO SIX MONTHS	Complete any outstanding trainings Bring any onboarding / orientation questions to supervisor or mentor/point of contact	Continue regular check-ins with new employee Provide time for questions & feedback Connect new employee to networking opportunities on campus	

ORIENT: Before the First Day

- ❑ Review HR email notifications for paperwork a new hire needs to complete
 - Confirm Benefits enrollment and new hire paperwork is submitted prior to new employee meeting with HR on new hire start date (*incomplete paperwork will delay ePAR approval and system access*)
- ❑ Contact HR if position will need access to People Admin
- ❑ Verify approval access for Non-Exempt employees: [Time Entry Approval](#)
- ❑ Send an information announcement about the new team member and their background to you office, department, or division welcoming them
- ❑ Set up your new employee's work station or office, including desk and/or office computer
 - Provide a clean desk in a cubical or office that is in "move-in condition"
 - Order computer, laptop, or any other technology needed
 - Work with IT to have computer prepped & ready for new employee: include access to Google Calendars & Drives, Box Share, department specific tools & documents
 - Obtain list of software/system access your new hire will need and request access: [Security Access Guide](#)
 - Arrange for phone setup if needed: [Telecommunications](#)
 - Update nameplate: [Wildcat Design & Print](#)
 - Obtain information and order business cards: [Business Card Form](#)
 - Obtain information for magnetic name tag, uniforms, or department specific items
 - Provide necessary office supplies
- ❑ Send welcome email ONE WEEK PRIOR to start date and include the following: [Welcome Email Template](#)
 - Date and time to arrive first day
 - What to bring to complete HR paperwork
 - Where to report and who to ask for
 - Transportation and/or parking information
 - What to expect during the first day on the job
 - Attach itinerary for first day or first week: [First Week Itinerary Template](#)
 - Options for lunch (better yet, arrange to take them out with you and/or a group of colleagues)
- ❑ Encourage your team to send welcome emails to their new team member
- ❑ Set up appointments with individuals your new employee should meet
- ❑ Set aside time in your calendar to make sure you're available for your new employee's first days and weeks - we recommend bi-weekly one-on-one meetings to start
- ❑ Schedule check-in meetings at 30 days, 60 days, 90 days and 6 months

ORIENT: First Day & Week

FIRST DAY

- Meet, greet and introduce to co-workers
 - Connect with point of contact if supervisor is unavailable
- Show new hire their office/workspace, where personal effects can go, kitchen/breakroom, restrooms, supply room, printer/copier, etc.
- Share work contact information: phone, email, and W#
- Go over agenda for the day
- Tour key areas of the department, building, and campus
- Walk your new team member through or assign someone to help them with the following:
 - Take to Miller Admin/Human Resources: first day Benefits completion meeting
 - Request keys and building access: [Key & Electronic Access](#)
 - Pick up keys at Facilities Management: Key & Lock Shop
 - Get Employee Wildcard at Union Building Wildcard Office
 - Request UTA Pass on eWeber Portal
 - Pick up at Union Building Wildcard Office
 - If applicable, apply for WSU Purchasing (P-Card): [Purchasing Card Request](#)
(If approved, an appointment for P-Card training will be sent via WSU Staff email)
 - Request provisioning for additional access needed

FIRST WEEK

- Go over [Topics to Be Covered by Supervisor/Department \[9\]](#)
- Go over new employee programming
 - Welcome Orientation (HR | OWL will auto-register new hires)
 - Required Training for New Employees (info provided by HR | OWL)
- Schedule time to do Probationary PREP
- Check in at the end of each day

LAUNCH: First 30 to 90 Days

→ *At 60 days ask your new hire how their role compares with what was described during the interview process. Ask them to provide feedback about the onboarding process — what has been helpful and where adjustments could be made.*

- Schedule regular meetings throughout the first six months
- Use [Getting to Know You: The Department & Division \[10\]](#)
- Begin Probationary PREP in People Admin
- Go over Job Description
 - Explain position in relation to other co-workers/team
 - Explain position in relation to other units within department or division
- Discuss Department norms and expectations
 - Communication preferences with supervisor and colleagues—phone, email, Google Chat, one-on-one meetings
 - Written/unwritten rules: what does “on time” to a meeting look like, taking time to socialize with colleagues, doors open/closed, working from home, etc.
 - Explain acceptable and unacceptable performance behaviors
 - Explain the meaning of common acronyms used by department/team
 - Department policy on participating in the Wellness program
 - Department policy on taking and/or teaching courses
- Ensure that you have arranged for proper training for your new staff member
 - Job specific training
 - Additional training suggestions:
 - PAW Place
 - P-Card/Travel Expenses
 - Coach Certification Training
 - Becoming Brand Certified
 - Purple P.R.I.D.E. Customer Service
 - Drivers Certification
 - Register for trainings through [Training Tracker](#)

CONNECT: 90 Days to One Year

90 DAYS TO SIX MONTHS

- *Encourage your new team member to get involved in the WSU Community.*
- *Suggest they talk to colleagues about campus groups, professional activities, and the various opportunities to create connections and engage their interests.*

- Continue to meet regularly to provide guidance and answer questions
- Keep up to date on WSU information and events through website, announcements, newsletters, and social media channels
- Further opportunities for connection:
 - Faculty Staff Association
 - Staff Advisory Council & Faculty Senate
 - Teaching & Learning Forum Book Groups
 - Utah Women in Higher Education Network
 - Professional development opportunities
 - Office of Workplace Learning
 - LinkedIn Learning
 - Employee Wellness Program
 - Various WSU Committees
- Annual events:
 - President's Back to School Breakfast & Summer Picnic
 - Take Our Daughters & Sons to Work Day
 - Employee Learning Week
 - Health & Wellness Week
 - Customer Service Week
 - Staff Awards Luncheon
 - Faculty Awards Luncheon

AT SIX MONTHS

- Complete Probationary PREP
- Begin PREP Process for Annual Review depending on Division calendar
- Schedule meetings at least once a month for the rest of their first year

AT 12 MONTHS

- Acknowledge & Celebrate Employee Anniversary

A person in silhouette stands on a mountain peak, talking on a mobile phone. The background is a cloudy sky. The text 'IGNITE THE POWER WITHIN' is overlaid on the right side of the image.

IGNITE

**THE POWER
WITHIN**

Onboarding Resources

TOPICS TO BE COVERED BY SUPERVISOR

INFORMATION COVERED BY WELCOME ORIENTATION

- WSU history, vision, mission, core values, and strategic initiatives
- WSU organization chart
- eWeber Portal navigation & recommended apps
- Employee wellness, professional development, and networking opportunities

SUPERVISORS: Check off items as you address them with your new employee

- Terms of employment (employment program/probationary period/pay)
- Job duties and performance expectations
- Performance review and PREP Process
- Work schedules, breaks, and overtime
- Paydays, time and time off reporting:
 - Leave Tracker
 - Types of leave and accrual rate
 - Overtime and/or flextime, if applicable
 - Requesting time off
 - Holiday schedule
 - Paid volunteer/charity time
 - Bereavement leave
 - Family & Parental Leave
- Email account, WSU approved [signature](#), usage tips, and policies
- Telephone use, policies, etiquette, voicemail greetings, and out of office procedures
 - Request long-distance code, if applicable
- Google Calendar, Drive, Box Share, and position-specific eWeber portal apps
- IT Assistance contact information for your department
- Review office equipment (copiers, printers, fax, etc.) and ordering supplies
- WSU Virtual Private Network (VPN) System: [VPN](#)
- [WSU Branding Guidelines](#) and Becoming Brand Certified Training
- Emergency contact information and evacuation procedures
- [WSU Code Purple](#)
- Inclement weather procedures and policies
- [WSU Employee Handbook](#)

GETTING TO KNOW YOU: The Department & Division

→ *This list is to help you orient your new hire to the uniqueness of how your department and division operate. Use this as a guide to conversations as you meet with your new hire to help them better navigate the culture of WSU and specifically your area.*

COLLEGE & DIVISION SPECIFIC INFORMATION

- College & Division vision, mission, core values, and goals
- College & Division website
- Letterhead, logos and marketing plan, if applicable

DEPARTMENT SPECIFIC INFORMATION

- A brief history of your Department
- Department's primary constituents & services provided
 - Discuss the Department's commitment to its constituents and the importance of being a good representative, including first impressions and potential consequences
- Discuss expectations for involvement on campus
- Departmental partners - both on and off campus
- Provide a list of individuals who may serve as resources
- Provide partner and colleagues' office locations
- Office cleaning procedures and schedule
- Location of emergency exits, fire extinguishers, first aid kits, and defibrillators
- Accident reporting procedures and how to report injuries on the job
- Work area/specific safety procedures, if applicable
- University property, intellectual property, and proprietary information policies
- Review University Audit Checklist
- Reporting of Suspicious or Unethical Behavior

CHECK IN QUESTIONS

→ *This list is to help you orient your new hire to the uniqueness of how your department and division operate. Use this as a guide to conversations as you meet with your new hire to help them better navigate the culture of WSU and specifically your area.*

- How is your job going? What are highlights of your experiences so far?
- Is this role what you thought it would be?
- What surprised you during your first few months on the job?
- How do you see your job relating to the University's mission?
- Has the onboarding process been helpful?
- What suggestions do you have to improve our onboarding process?
- Was your new employee orientation program helpful and informative?
- Do you feel properly equipped to do your work well? Anything else you need?
- Do you have enough, too much, or too little work?
- How are you getting along with your co-workers?
- When you have questions at work, who do you talk to?
- Do you feel comfortable asking questions?
- Do you believe your ideas are valued? Can you give examples?
- Is there something we should be providing that we are not?
- Is there anything else you need that you don't have access to?
- Is there anything you feel "out of the loop" about?
- How can I help you succeed?
- Is there anything you would like to tell me that I have not asked about?

Adapted from HR Specialist: HR Answers You Can Trust. (2017).
Onboarding: 15 questions to ask employees in their first 60 days. Retrieved from
http://www.thehrspecialist.com/2751/15_questions_to_ask_employees_in_their_first_60_days.hr?cat=tools&sub_cat=memos_to_managers

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Seven Questions to Ask Your New Hire After Three Months. Forbes. Retrieved from
<https://www.forbes.com/sites/forbescommunicationscouncil/2016/12/28/seven-questions-to-ask-your-new-hire-after-three-months/#5b182248d66a>

ONBOARDING TIPS & SUGGESTIONS

→ *We get one chance to make a first impression. A strong onboarding process leads to higher job satisfaction and performance levels as well as lower turnover. Take some time to plan and try a few of the items below. A little planning goes a long way.*

IDEAS TO INCORPORATE:

- A welcome sign, gift or treat at their desk on their first day
- Plan a special lunch on their first day with their whole team
- Select a staff member to be a mentor or point of contact for your new team member's first few months
- Have a schedule of meetings and projects booked for their first few weeks
- Provide a list of what their major project responsibilities will be with associated deadlines during their first six months
- Make sure first assignments lead to success
- Help people feel like they belong and do so quickly by giving opportunities to work alongside colleagues outside the office
- Create a directory of your new hire's favorite things or treats, as well as the rest of your staff, and celebrate special events through the year
- Ask yourself and your team: what do you wish your first day and week included?

Adapted from Headway Workforce Solutions. (2017).
Top 5 Onboarding Mistakes to Avoid. Retrieved from
<https://www.headwaywfs.com/2018/11/top-5-onboarding-mistakes-to-avoid/>

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Onboarding Mistakes to Avoid and Some Creative Ideas to Adopt. Retrieved from
<https://www.shrm.org/hr-today/news/hr-magazine/0616/pages/onboarding-mistakes-to-avoid-and-some-creative-ideas-to-adopt.aspx>

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11 HR Experts Share Their Top Employee Onboarding Tips. Retrieved from
<https://thinkwise.cloud/insights/employee-onboarding-experts>

ONBOARDING MISTAKES TO AVOID



→ *You want your new employee to feel comfortable and be excited about their job - for their success, for the department's success and for your own. Here are the top ways to prevent your new employee from wondering if taking this job was the right thing.*

AVOID THESE:

- Scheduling the new employee to start while their supervisor or team members are out of the office.
- Wasting their first day or week as they wait for computers, logins, access to files or software needed to do their job.
- Giving them a workspace that is still full of previous or unnecessary files.
- Not setting clear expectations from the beginning.
- Not providing employee follow-up and feedback.
- Cramming 20 hours' worth of info into 4 dull hours.
- Neglecting to introduce new hires to co-workers.
- Abandon the new employee to manage on their own while co-workers pair up and head out to lunch.
- Adopting a sink-or-swim approach because it worked for you.
- Give the employee "busy work" that has nothing to do with their core job description, because you are having a busy week.

Source: Adapted from Headway Workforce Solutions. (2018).
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<https://www.headwaywfs.com/2018/11/top-5-onboarding-mistakes-to-avoid/>

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<https://www.headwaywfs.com/2018/11/top-5-onboarding-mistakes-to-avoid/>