NEW EMPLOYEE ONBOARDING SUPERVISOR GUIDE
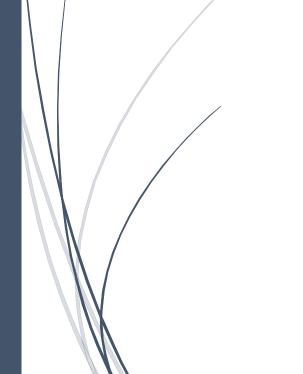
BALL STATE UNIVERSITY
UNIVERSITY HUMAN RESOURCE SERVICES

CONTENT

THE IMPORTANCE OF ONBOARDING

Onboarding helps to cultivate long-term relationships, promote a better understanding of the Ball State culture, and foster a feeling of belonging and purpose. When done properly, it also increases new employee motivation, performance, and retention. As an example of the importance of onboarding, before Ball State conducted the presidential search in 2016/2017, the university leadership and the Board of Trustees committed to providing the new president, Geoffrey S. Mearns, with onboarding tools designed to help accelerate the onboarding process.

OVERVIEW

Onboarding is a continuing process that begins before a new (or transitioning) employee's start date and lasts through the first six (6) to twelve (12) months of employment.

The *New Employee Onboarding Supervisor Guide* is designed to help supervisors save time, stay organized, and prepared during the onboarding process. As such there are two checklists which complement the Guide, one is for supervisors and one is for the new employee.

ONBOARDING GOALS

- To get the new employee the tools and resources to be successful.
- To help the new employee understand and navigate the university culture.
- To help cultivate a long-term relationship.
- To minimize the time between a new employee's first day and the day they become productive members of their workgroup by arranging appropriate training and network.

UHRS HR-TMS ONBOARD

Before new employees join the Ball State University community onsite, University Human Resource Services (UHRS) will send an informational e-mail and will initiate the onboarding process through Onboard.

Please keep in mind that every employee and situation is different. The information and timeline covered are important, but flexibility and customization is encouraged. The supervisor's role in this process is critical to the success of the new employee. Supervisors are not alone, however. Please contact UHRS by e-mail at humanresources@bsu.edu or by phone at 285-1834 if there are any questions.

The new employee will receive many useful items electronically through Onboard. Onboard items are listed on page 15.

USING THIS ONBOARDING GUIDE

The *New Employee Onboarding Supervisor Guide* will walk you through your new employee's first year of employment. It provides guidelines on how and when to complete certain actions that will help the new employee succeed.

The onboarding process is broken into several sections starting with "Before Day One" and ending with "First Year". Within each onboarding section, you, the supervisor, are given suggested actions that you are encouraged to complete including check-in sessions.

A check-in session, designed to confirm progress in areas other than visible performance, also offers the opportunity to discuss relationships with colleagues, potential frustrations or concerns with the job, and successes and struggles.

The more you do up front to prepare, the more successful you and your new employee will be.

KEY ROLES RESPONSIBILITIES

Supervisor

- Fully participates in onboarding new employees as outlined in the department/unit program.
- Selects the onboarding coordinator and onboarding partner.
- Determines the onboarding coordinator's and partner's assignments.
- Encourages the onboarding coordinator's and partner's timely feedback.
- Welcomes new employee.
- Communicates job expectations.
- Ensures tasks are coordinated within the onboarding process.
- Delegates meaningful work assignments.
- Determines training/development plan.
- Communicates department vision/mission/culture.
- Is available for frequent check-ins.
- Ensures timely performance feedback.

Onboarding Coordinator   The onboarding coordinator role is not a new job/position. It involves activities performed as determined by the supervisor whenever there is a new employee in the department or office. In some departments, the Onboarding Coordinator's and the Onboarding Partner's responsibilities may be assigned to the same employee.

- Oversees the onboarding process within the department.
- Coordinates the onboarding process with the new employee's supervisor.
- Primary contact for the program. Accountable for review, enhancement, and maintenance of program.
- Ensures immediate administrative needs of the new employee are met.
- Coordinates meetings and schedules as needed.
- Tracks progress of the onboarding process.
- Ensures the new employee has an opportunity to provide feedback on the onboarding experience.
- Consults with UHRS as needed.

Onboarding Partner - The "Go-to-person"

- The onboarding partner is the point of reference who offers support and guidance for the new team member.
- May be a co-worker with significant university experience to provide accurate, positive, and meaningful information.
- Plays an active role in orienting the new employee to the department and university.
- Welcomes new employee and make introductions.
- Helps the new employee understand and navigate the university's work environment, culture, etc.
- Checks in frequently with new employee.
- Serves as a resource or connect the new employee with resources to answer specific questions.

BEFORE DAY ONE - Ensure everything is in place to welcome your new employee.

UHRS

Onboard will generate an email containing the instructions and link to access Onboard. Send out notification to the hiring manager or supervisor after the candidate is selected and/or offer letter is sent.

- **New positions:** Notifications include the supervisor's name, new employee's name, position title, start date, and department.

- **Internal transfers:** Notifications include the supervisor's name, employee's name, position title, start date, and department.

Supervisor See the *Onboard Supervisor Checklis*t on page 10-12.

Brainstorm ideas on how to welcome new employees within the department to personalize the onboarding experience.
Examples:
- Buy a small BSU branded gift.
- Welcome card signed by co-workers.
- Add a welcome sign at the door with the person's name.
- Welcome snack celebration (fruit, cookies, etc.), to greet the person.

Optional: Consider making lunch plans for day one at your discretion (possibly inviting the team to join).
Collaborate activities with Onboarding Coordinator for assistance**.**

Onboarding Coordinator

Collaborate with supervisor and prepare necessary onboard materials.

Onboarding Partner

Be prepared to assist in making the entry into the college, department, or unit as smooth and as seamless as possible.

THE FIRST DAY - This is the new employee's first real impression of Ball State University, his or her team, and the working culture.

Supervisors

- Collaborate activities with the Onboarding Coordinator for assistance.

Onboarding Coordinator

- ☐ Schedule one-on-one meeting with new employee and supervisor, if applicable.
- ☐ Answer any immediate questions/concerns, including who to call for particular questions.
- ☐ Communicate basic information about the workplace.
- ☐ Ensure employee reads and signs the IT Security **Employee Confidentiality Agreement** *(also titled "Model Confidentiality and Information Access Agreement")*. This agreement is available and may be completed online via HR-TMS Onboard.
- ☐ Instruct the new employee to obtain a BSU photo ID from Bracken Library, Room 001. If the new employee has questions, he or she may contact the ID card office at 765-285-2273, visit their website, or e-mail idcards@bsu.edu.
- ☐ Provide the new employee with card and/or key for building access (if applicable).
- ☐ Introduce the new employee to BSU online tools (e-mail, resources, etc.).

Onboarding Partner

Optional: Consider having lunch (no obligation to pay) or organizing a pitch-in to welcome the new employee.

THE FIRST WEEK - New employees may face the challenge of learning about the culture of the organization. The following will help the supervisor know what to do for the new employee to be successful.

Supervisors

- Ensure a job training plan is in place for the new employee.
- Introduce new employee to MyBSU and Self-Serve Banner.
- Ensure the new employee has access to departmental systems, *e.g. SciQuest, INB, Argos, BannerWorks, HR-TMS (PeopleAdmin), etc., if applicable.*
- Collaborate activities with the Onboarding Coordinator for assistance.

Onboarding Coordinator

- Ensure the new employee is introduced to key contacts within the, college, division, department or unit, and functional areas.
- Demonstrate the applicable college's, department's, or unit's online tools and processes.
- Examples: Self-Service Banner (SSB) (including Accessibility), Kronos Timekeeper, MYBSU, SciQuest, Travel & Expense Management, etc.
- Explain how to report problems with BSU username and password through the Technology Help Desk and/or UHRS.

Onboarding Partner
- Introduce to peers in the department, college, or unit and other key areas.
- Provide employee with a tour of campus.
- Make an effort to meet as often as possible for the first week.

*Optional***:** Consider having lunch (no obligation to pay) with the new employee.

THE FIRST MONTH -- It is important for the new employee to have a good grasp of job responsibilities and his or her general function within the team after 30 days. The new employee should become comfortable utilizing systems to maximize their efficiency.

Supervisor
- Collaborate activities with the Onboarding Coordinator for assistance.

Onboarding Coordinator
- Check in with new employee regularly and answer any questions he or she may have or direct him or her to someone who has the information.

Onboarding Partner
- Familiarize the new employee with the university's systems and processes.
- Provide a point of reference, support, and guidance for the new employee.
- Assist the new employee in understanding and navigating the university's work environment.

THE FIRST THREE MONTHS PROGRESS REVIEW -- The new employee should feel assimilated and self-sufficient. The employee's work and goals should align with the college, department, or unit, and his or her team.

Supervisor
- Schedule a meeting with new employee. Use the *New Employee 3-Month Progress Review* (page 16) form to help guide the conversation. Provide feedback.
- Perform the 90-day probationary review for staff and service personnel per UHRS.
- Confirm that the new employee is engaged with his or her work and team. Make any necessary adjustments to focus on maximizing the new employee's satisfaction and contribution.
- Set training expectations, if needed.
- Ensure the new employee, peer, and customer meetings are on schedule and progressing well.
- Ensure your new employee is becoming self-sufficient, understands the role and expectations, and is executing his or her objectives.
- Collaborate activities with the Onboarding Coordinator for assistance.

THE FIRST SIX MONTHS (180-day check in). Continue to promote collaboration and teamwork.

Supervisor
- The new employee should understand his or her roles and expectations. Is he or she executing objectives?
- Work to ensure your new employee is becoming self-sufficient.
- Schedule a check-in session with the new employee. Topics for conversation may include:
    - Does the new employee understand his or her role?
    - Is the job what he or she expected?
    - What ideas does the new employee have for improvements within the department or larger community?
    - Does the new employee feel comfortable with colleagues? Does the new employee feel as if he or she is fitting in?
    - Are there issues with colleagues that need to be addressed?
    - Does the new employee have feedback about your relationship with him or her?
    - What feedback can the new employee provide regarding the onboarding process?
- Send selected questions to your new employee prior to your meeting with him or her, such as an agenda/guide for the discussion.
- Recognize the Onboarding Coordinator and the Onboarding Partner for his or her role in the program at your discretion, and make a note in the performance evaluation.
- Collaborate activities with the Onboarding Coordinator for assistance.

Onboarding Coordinator
- Check in with the new employee regularly to answer any questions he or she may have, or direct him or her to the key person who has the information.

Onboarding Partner
- Continue to focus on network building with the new employee.
- Formally wrap up onboarding partner program; encourage mentor/peer relationship.

THE NEXT SIX MONTHS

Over the next six months until the end of the first year of employment, the supervisor and Onboarding Coordinator collaborate efforts to ensure that the new employee continues to get support.

Celebrate New Employee's Anniversary!
- Evaluate and review the onboarding process.
- The Onboarding Coordinator formally concludes the onboarding process and obtains final feedback from the new employee.

THE FIRST YEAR (*One-year anniversary check-in)

Supervisor
- Schedule a check-in session with the new employee to wrap up the onboarding process that includes an evaluation and review of the yearlong onboarding process.
- **Topics for conversation may include:**
  - Does the new employee understand his or her role?
  - Is the job what he or she expected?
  - What ideas does the new employee have for improvements within the department or larger community?
  - Does the new employee feel comfortable with colleagues?
  - Does the new employee feel he or she are fitting in?
    - If not, are there issues with colleagues that need to be addressed?
    - Does the new employee have feedback about your relationship with him or her?
    - What feedback can the new employee provide regarding the onboarding process?

NOTE: Formal UHRS annual performance evaluations are done in March/April. This may not coincide with the new employee's one-year anniversary.

Onboarding Coordinator
- Celebrate! Send congratulations message to new employee.

BSU ONBOARDING PROGRAM REVIEW

UHRS will periodically evaluate the onboarding process to assess its effectiveness and efficiency. The program review will identify components that are positively received and should not be changed along with areas that might need modification. In addition, UHRS will track new employee retention rates (1-18 months).

Data Sources:
- Employee Onboard surveys at 21 days, six months, and one year.
- Supervisor surveys/reviews at six months and one year.
- Banner data.

Please contact UHRS at 285-1834 for more information.

SAMPLE DOCUMENTS

New Employee Onboarding Supervisor Checklist HR-188

Employee's Name: _____ Department: _____ Start Date: ___/___/__

Checklist is for personal reference only. Activities are to be completed within the first 30-60 days from the new employee's start date. Internal hires need to only complete relevant activates specific to the department.

Before Day One

Business Cards *(Order at least 1-2 weeks before start).*

- ☐ Select Onboarding Coordinator & Partner.

- ☐ Collaborate with Onboarding Coordinator & Partner.

- ☐ Create first-week schedule for the new employee.

- ☐ Confirm arrival date on campus and provide Relocation information, if applicable.

- ☐ Send welcoming message to new employee before first day.

- ☐ Discuss dress code.

- ☐ Discuss office hours.

- ☐ Confirm status of the new employee BSU username and email account setup.

- ☐ Begin to schedule key meetings and training for new employee.

- ☐ Confirm security access/forms, if applicable.

- ☐ Workstation setup (Computer, phone, office/desk nameplate, supplies, files, lockers, etc.).

- ☐ Ensure office keys are available, if applicable.

- ☐ Order/create name tag, if applicable.

- ☐ Follow-up with new employee (email, call).

- ☐ Discuss with new employee that they have paid for Parking.

- ☐ Confirm with UHRS new hire's orientation date, time, & location.

Notify colleagues with new employee's start date and ask them to add the new hire to their email distribution list.

The First Day

- ☐ Welcome the new employee.
- ☐ Give new employee nametag, if applicable.
- ☐ Conduct face-to-face introductions of new employee with colleagues. Show location of colleagues' offices, break area, supply cabinet, bathrooms, etc.
- ☐ Confirm I-9 was completed at Human Resources in AD 350 on first day of employment.
- ☐ Ensure new employee signs department compliance forms.
- ☐ Discuss the job specifics if the position is considered essential personnel.
- ☐ Discuss employee's reporting of work/vacation/sick hours/Kronos.
- ☐ Discuss probationary period, if applicable.
- ☐ Discuss overtime/comp time policy, if applicable.
- ☐ Discuss sick leave policy.
- ☐ Discuss vacation policy/how to request.
- ☐ Discuss work place do's & don'ts.
- ☐ Provide conflict of interest information, if applicable.
- ☐ Discuss emergency building plans.
- ☐ If applicable, have the new employee sign for keys.
- ☐ Issue personal safety/protective equipment, if applicable.
- ☐ Discuss job description & expectations.
- ☐ Discuss individual goals/work plan.
- ☐ Confirm new employee has reviewed the employee handbook. Service employees receive their handbook in orientation. All other handbooks are available online.
- ☐ Identify customers & frequent contacts. Provide face-to-face or email introductions.
- ☐ Provide list of key phone numbers, client phone list & inform on how to use the BSU online directory.

Optional: Consider taking the new employee to lunch.

The First Week

- ☐ Ensure new employee attends new employee orientation.
- ☐ Review calendar of major upcoming events and deadlines.
- ☐ Set 30-day priorities or on-the-job training.
- ☐ If the new hire has direct reports, schedule relevant meetings.
- ☐ Establish preferred method of communication: Stop by office, schedule a meeting, email, and/or phone.
- ☐ Introduce new employee to MyBSU and Self-Serve Banner.
- ☐ Ensure new hire has access to departmental systems, e.g. SciQuest, INB, Argos, BannerWorks, HR-TMS, (PeopleAdmin), etc., if applicable.
- ☐ Set up duo (two-factor) authentication, if applicable.
- ☐ Review department customer service expectations. Review university and departmental policies.

The First Month

- ☐ Ensure employee is engaged with his/her work and team; and make any necessary adjustments to focus on maximizing employee satisfaction and contribution.
- ☐ Discuss how you want your new employee to prepare for your one-on-ones with you.

- ☐ Ensure there are no overlaps with Onboarding Partner and/or Coordinator of responsibilities or redundancy in your focus areas.
- ☐ Ensure the new employee has all necessary materials and is becoming familiar with the job, team and campus.
- ☐ Confirm that new employee has looked through the Employee Guide—Link to PDF listed under the "Guide" tab.
- ☐ Provide list of acronyms and abbreviations, if applicable.
- ☐ Discuss department goals, mission, & values.
- ☐ Discuss university goals, mission, & values.
- ☐ Review department and university policies.
- ☐ Discuss timing and process of performance evaluation.
- ☐ Discuss relevant timelines *(projects, learning curve),* if applicable*.*
- ☐ Provide department/division organizational chart.
- ☐ Discuss department, division, and/or university's strategic plan.
- ☐ Discuss shadowing co-worker, if applicable.
- ☐ Review and clarify performance objectives and expectations after the first month.
- ☐ Be available to the new employee, as needed, both for impromptu or scheduled meetings.
- ☐ Meet at least once a week for the first 90 days. Spend quality, productive time with your new employee early on.

Training

- Discuss Learning & Development sessions available.

BSU and Muncie Community resources are available in the Employee Guide.

OnBoarding Follow Up—Watch for e-mails with surveys at these intervals:
- Twenty-One-days review.
- Six-Month Review – *Send agenda to employee before scheduled meeting,* if applicable.
- One-Year One-on-One Progress Review – *Send Congratulations e-mail/note. NOTE:* This is not the same as the annual HR performance evaluation.

Other

- Provide specifics to the department or job:

_____

_____

_____

New Employee Onboarding Employee Checklist HR 184

Employee's Name: _____Department: _____ Start Date: ___/__/__

Checklist is for personal reference only. Activities are to be completed within the first 30-60 days from the new employee's start date. Internal hires need to only complete relevant activates specific to the department.

Before Day One

- ☐ Obtain BSU ID - Please contact the ID card office at 765-285-2273, visit their website, or e-mail idcards@bsu.edu.
- ☐ Purchase parking permit.
- ☐ Complete I-9 and bring supporting documents to University Human Resource Services, Administration Building, Room 350 on or before your first day of employment.
- ☐ Check on your e-mail account & set up your password.
- ☐ Confirm arrival date on campus with supervisor and view Relocation information, if applicable.
- ☐ Follow-up with supervisor by email or phone as needed.
- ☐ Familiarize yourself with the BSU website and take a moment to take the virtual tour.

The First Day – *Discussion with your supervisor*

- ☐ Receive nametag, if applicable.
- ☐ Meet your colleagues/participate in department orientation or job specific tour (break area, supply cabinet, bathrooms, etc.).
- ☐ Meet your Onboarding Coordinator and/or Partner.
- ☐ Sign department compliance forms.
- ☐ Discuss the job specifics if you are considered essential personnel.
- ☐ Discuss office hours.
- ☐ Discuss how to request and report work/vacation/sick hours on Kronos.
- ☐ Discuss overtime/comp time policy, if applicable.
- ☐ Discuss probationary period.
- ☐ Discuss vacation and sick leave policy.
- ☐ Discuss work place do's & don'ts.
- ☐ Ask follow-up questions about dress code.
- ☐ Discuss any conflict of interest, if applicable.
- ☐ Discuss emergency building plans.
- ☐ If applicable, have the new employee sign for keys.
- ☐ Receive personal safety/protective equipment, if applicable.
- ☐ Discuss job description & expectations.
- ☐ Discuss individual goals/work plan.
- ☐ Review employee handbook. Service employees receive their handbook in orientation. All other handbooks are available online.
- ☐ Did you receive a list of frequent contacts, key phone numbers, a client phone list and were informed on how to use the BSU online directory?

The First Week

- ☐ Attend new employee orientation.
- ☐ Review calendar of major upcoming events and deadlines.
- ☐ Discuss 30-day priorities or on-the-job training.
- ☐ Discuss relevant meetings with your direct reports, if any.
- ☐ Discuss preferred method of communication: Stop by office, schedule a meeting, e-mail, and/or phone.
- ☐ Familiarize yourself with the university's online MyBSU and Self-Serve Banner.
- ☐ Receive access to departmental systems, e.g. SciQuest, INB, Argos, BannerWorks, HR-TMS (PeopleAdmin), etc., if applicable.
- ☐ Set up duo (two-factor) authentication, if applicable.
- ☐ Review department customer service expectations.
- ☐ Review university and departmental policies.

The First Month

- ☐ Review Employee Guide available online—Link to PDF listed under the "Guide" tab.
- ☐ Did you receive a list of relative acronyms and abbreviations? (if applicable)
- ☐ Discuss department goals, mission, and values.
- ☐ Discuss university goals, mission, & values.
- ☐ Review department and university policies.
- ☐ Discuss timing and process of performance evaluation.
- ☐ Discuss relevant timelines (projects, learning curve), if applicable.
- ☐ Review department/division organizational chart.
- ☐ Discuss department/division, and/or university's strategic plan.
- ☐ Discuss shadowing co-worker, if applicable.
- ☐ Ensure you have enrolled in benefits (some are legally limited to enrollment in first 30 days of employment.).

Training

- Discuss Learning & Development sessions available.

BSU and Muncie Community resources are available in the Employee Guide

OnBoarding Follow Up— Watch for e-mails with surveys at these intervals:
- Twenty-one days review.
- Six-Month Review – Send agenda to employee before scheduled meeting, if applicable.
- One-Year One-on-One Progress Review – Send Congratulations e-mail/note. (This is not the same as the annual HR performance evaluation).

Other—specific to the department or job:

_____

List of Onboard Documents

Before their first day of employment, UHRS will send the official offer letter and initiate the onboarding process to the new employee. The following documents will be electronically accessible to the new employee through Onboard.

- Welcome to BSU - Informational
- ☐ **I-9 Instructions - Action Required**
- ☐ **I-9 - Action Required**
- ☐ **I-9 Supporting Documents - Action Required**
- ☐ **Indiana State Tax Form - Action Required**
- ☐ **W-4 - Action Required**
- ☐ **Direct Deposit - Action Required**
- Benefits Rates - Informational
- PERF/TRF at a glance - Informational
- ☐ **PERF/TRF Membership Record - Action Required**
- Marketplace Healthcare Exchange Notice - Informational
- Retirement Savings - Informational
- ☐ **Universal Availability Notice - Action Required**
- ☐ **Confidentiality & Information Access - Action Required**
- ☐ **IT Employee Confidentiality Agreement - Action Required**
- ☐ **Acknowledgement of Employee Handbook Access - Action Required**
- Drug-Free Campus Brochure - Informational
- Universal Precautions - Informational
- HR Contact Info - Informational
- BSU Map App - Informational
- ☐ **Virtual Tour - Action Required**
- ☐ **BSU Employee Photo ID - Action Required**
- ☐ **Purchase Parking Permit - Action Required**
- ☐ **Emergency Alerts - Action Required**
- ☐ **Visit University Human Resource Services - Action Required**

New Employee Onboarding 3-Month Progress Review

Employee & Supervisor complete prior to scheduled 3-month check-in session then discuss responses.

Date: _____

Employee Name: _____ Title: _____

Department:

_____ Supervisor

Name: _____ Title: _____ **Check**

appropriate answers below.

1. Do you understand the requirements of your job?
   - ☐ Yes
   - ☐ Somewhat
   - ☐ No

2. Do you feel your training has been adequate to successfully complete your job?
   - ☐ Yes
   - ☐ Somewhat
   - ☐ No

3. Do you have regular opportunities to discuss your work and objectives with your supervisor?
   - ☐ Yes
   - ☐ Somewhat
   - ☐ No

4. Would you like to have more informal meetings with your supervisor?
   - ☐ Yes
   - ☐ Possibly
   - ☐ No

Please answer the following by circling the most accurate response. On a scale of 1 to 5 (5 is strongly agree, 1 is strongly disagree).

5. Does your position satisfy your personal/professional goals?   1   2   3   4   5

6. Satisfaction level of your employment at Ball State University.   1   2   3   4   5

Do you have any knowledge, skills, and abilities not fully utilized in your job? If so, what are they and how could they be used? _____

_____

_____.

Is there any additional help, training, or coaching you would like from your supervisor?
_____

_____

_____.

Other comments? _____

_____

_____.

Tips on Creating an Employee Development Plan

Investing in the progress and growth of the new employee aids in the success of the department. An employee development plan should be a collaborative effort between you and the employee. It can include a variety of activities such as:

- Informal on-the-job training
- Formal classroom and/or online training
- Conferences and special events
- Self-study activities.

Regardless of the formality of the plan, you should work with your new employee to create the plan by:

- Breaking down the job by the knowledge, skills, and abilities required.
- Determining the new employee's current competency level in each area.
- If a gap in skills exist, discuss potential training and learning opportunities to strengthen those areas.
- Prioritize the needs and create a plan.