

New Employee Onboarding Resource for Managers

A guide to support supervisors in creating a successful onboarding experience for new employees

Before the employee's **START DATE**

- Submit the ServiceNow request.
 - Order technology equipment and necessary software.
 - Arrange for access to common drives and coordinate network roles and authorizations.
- Select the team member who will serve as the new employee's onboarding buddy. Meet with them to discuss their role in welcoming the new employee to the team.
- Connect with employee via phone.
 - Confirm First Day expectations i.e. start date, time, location, dress code, etc.
 - Identify computer needs and requirements.
 - Provide the name of their team onboarding buddy.
 - Ask new employee for preferred name to order business cards/name plate, if appropriate.
 - Remind employee to check email for information on attending the New Employee Onboarding Orientation session.
 - Arrange any important trainings required for the job.
- Email department/team/functional area to introduce the new employee.
 - Include start date, employee's job role, and bio. Copy the new employee, if appropriate.
- The hiring manager meets the new hire for lunch. Then, arranges lunch with the appropriate person(s) or onboarding buddy during first week, if appropriate.
- Create a team welcome packet that includes: job description, important contacts, campus map, parking and transportation information, mission and vision of UTHealth Houston, and information about the team/department.
- Ensure the work area is set up and ready with supplies.
 - If the new employee is remote, ensure they have necessary supplies available or make arrangements for them to pick up supplies, etc.
- Arrange for parking on first day, if needed.
- Add the new employee to relevant email lists and any existing meetings.

Employee's **FIRST** day of work

- Be available to greet the employee on the first day.
- Email the department/team/functional area about the new employee and include start date, employee's role, and bio.
- Introduce employee to others and their onboarding buddy.
 - Arrange to take employee out to lunch/coffee (or have onboarding buddy take them).
- Clarify first week's schedule.
 - Review work hours.
 - Confirm any required/recommended training.
 - Explain how to access UTHealth Houston's [Intranet](#) and [A-Z directory](#) for helpful resources.
 - Explain policies and procedures for overtime, use of vacation/sick time, holidays, etc.
 - Explain any flexible work policies or procedures.
 - Explain how to obtain additional office supplies.
 - Provide information on setting up voicemail, computer, [email signature](#), etc.
- Provide an overview of the functional area - purpose, organizational structure, and goals.
 - Review job description, outline of duties, and define clear expectations.
 - Describe how the employee's role fits within the department and how their role contributes to the department, school/area, and organization.
 - Review the department's reporting structure with the employee and preferred method(s) of communication of the team.
- Provide new employee key(s) and building access, if needed.
 - Ensure new employee's badge is programmed for access to necessary areas.
- Discuss parking and transportation with new employee and provide information necessary to set up parking.
- Provide department or building-specific safety and emergency information.
 - Bring new employee on a building tour.

Employee's First WEEK

- Arrange for a personal welcome from the school/department leader.
- Ensure employee has necessary technology and understands how to use them - computer, access to systems, etc.
- Provide the employee their initial assignment.
 - Make it small and attainable to build confidence.
 - Be prepared to help the new employee prioritize, if necessary.
- Debrief with employee after he/she/they attend initial meetings and trainings, and begins work on initial assignment.
 - It will be helpful to quickly touch base each day.
- If necessary, provide additional contextual information about the department and organization to reinforce understanding of the purpose, goals and initiatives.
- Explain the annual performance review and goal-setting process.
- Review the process related to the probationary period. It is highly recommended that probationary reviews at 2, 4, and 6 months be completed. The 6 month probationary period evaluation is required.

Employee's First MONTH

- Continue introducing employee to key people and bring them to relevant events.
- Meet with employee and onboarding buddy to review first few weeks and answer questions.
- Arrange for employee to take a tour of the TMC campus (if not already completed.)
- Ensure employee has completed necessary new hire training in [iLearn](#) and/or [LinkedIn Learning](#).
- Schedule and conduct regular one-on-one meetings.
 - Continue to provide timely, on-going, and meaningful feedback.
 - Elicit feedback from the employee and be available to answer questions.
 - Explain the performance management process and compensation system.
 - Explain the timekeeping system and departmental expectations around requesting time off, reporting sick time, and holidays.
 - Discuss performance and professional development goals.
 - Give employee additional responsibilities.

Employee's First **THREE** months

- Continue having regular one-on-one meetings.
 - Create written performance goals and professional development goals.
- Meet with employee for informal three-month performance check-in.
- Check-in with employee and onboarding buddy.
- Continue giving the employee assignments that are challenging, yet achievable.
- Have employee shadow you or other team members at meetings to build work relationships with others and learn more about the department and organization.
- Provide information about continued learning opportunities and programs offered by the [Office of Human Resources](#).

Employee's First **SIX** months

- Conduct six-month performance review.
 - Review progress on performance goals and professional development goals.
- Create opportunities for employee to attend or be involved in an activity outside of their work area.
- Encourage employee to attend UTHealth Houston [events](#) as an opportunity to build work relationships with others.
- Arrange for employee to meet with appropriate department/school/area leader either one-on-one or in a small group setting with other new employees.

Employee's First **YEAR** [Between **six** and **twelve** months]

- Celebrate successes and recognize employee's contributions.
 - Ask employee about his/her/their first year experience.
 - Discuss ways employee's skills and knowledge are being utilized and ways to better utilize them (i.e. what's working, what more they need, etc.)
- Continue providing regular informal feedback; provide formal feedback during the annual review process.
 - Discuss professional development goals and identify relevant learning opportunities.