New Employee Onboarding Guide

Onboarding is the last stage of the recruitment process and the first step toward retention with a particular focus on:

- Creating a positive new hire experience
- Defining responsibilities and expectations
- Accelerating the time it takes for the new employee to become productive
- Long-term relationship building

An effective employee onboarding process serves the following interrelated purposes:

- Employees will feel welcome, prepared, and supported and these feelings will increase their ability to be productive and contribute within their department and the University
- Employee success leads to increased satisfaction and retention

As a supervisor, you have an important role to play in the onboarding process. The successful onboarding of an employee is dependent on the shared efforts of the supervisor, employee, co-workers, and Human Resources.

Employee Name:
Start Date:

PRE-ARRIVAL CHECKLIST

Pre-arrival is the assigned time-period from acceptance of a job offer to the first day on the job. The goal is to prepare for your new employee's arrival so they arrive to an organized and prepared workplace.

Set Up Workstation:
☐ Clean out workstation desk, drawers, filing cabinet
☐ Order name plate, office supplies, equipment and/or tools
☐ Order business cards (if needed)
☐ Contact TSC for University cell phone (if needed)

Coordinate System Access
☐ Submit **New Account Request Form** to TSC: https://www.uwinnipeg.ca/tech-sector/forms/account-requests.html
☐ Windows/Office 365 (campus network access)
☐ MS Teams
☐ Email address
☐ Personal, department shared drive, and additional drives/folders access
☐ Printing Account
☐ Phone Number/Voicemail Password
☐ Colleague Access, if needed
☐ Web Advisor, if needed
☐ Nexus, if needed
☐ VPN access
☐ University Zoom account, if needed

Coordinate Building and Office Access:

☐ Submit **Key and Electronic Access Requisition Form** to Facilities:
https://www.uwinnipeg.ca/facilities/docs/key_and_electronic_access_control_requisition_form.pdf

☐ Building/floor/office keys or access card

☐ Bathroom key, if needed

Prepare Communication and Required Information

☐ Announce the new employee's arrival to the department (i.e. email announcement)

☐ Schedule a welcome meeting/coffee break with the department to welcome the new employee

☐ Update position description and department organizational chart

☐ Create a training schedule

☐ Identify key position-specific policies and procedures for review and training:
https://www.uwinnipeg.ca/institutional-analysis/policies-and-procedures/index.html

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FIRST DAY/FIRST WEEK

The goal of the first day/week is to make a good first impression by welcoming your new employee and providing them with a solid foundation of knowledge about their role, department and the University.

FIRST DAY CHECKLIST

☐ Ensure supervisor is present to greet them upon arrival

☐ Introduction to co-workers

☐ Department tour including:
- washroom and lunchroom
- office supplies and storage
- mail, photocopier, fax, printer
- information about building access, emergency exits and evacuation, first aid kit and fire extinguisher

☐ Provide keys/access card

☐ Provide log-in IDs and passwords with instructions (computer, email, voicemail)

☐ Provide campus map

☐ Provide link to online Faculty and Staff directory: https://www.uwinnipeg.ca/directory/

☐ Provide information about UW Safe App, Safe-Walk and Safe-Ride Programs

☐ Schedule campus-wide tour (library, cafeterias, fitness centre, mail room, and other key areas)

☐ Confirm they have submitted all employment and benefits forms to Human Resources
- for questions about benefits/pension, tell them to contact HR
- for questions about parking, tell them to contact Parking Services

FIRST WEEK CHECKLIST

During the first week, schedule regular meetings with your new employee each day to orient them to the University and their role. Arrange 1-1 meetings as well as meetings with other team members so they feel welcomed and supported.

During their first week, it's important for you to meet with them to provide an orientation to their role, department and the university:

☐ Review their position description and provide a copy

☐ Review department organizational chart

☐ Review department website and shared drive

☐ Review department resources (training manuals, shared drive/folders, etc.)

☐ Discuss time-off processes (vacation/sick time, breaks, pay schedule, and overtime process

☐ Review and discuss training schedule

☐ Review University Governance and Administration
https://www.uwinnipeg.ca/about/administration/index.html

☐ Review UW organizational chart

☐ Review University webpages (Administration, Human Resources, Financial Services, TSC, etc.)

Policy Information and Review:

☐ Email link to online University Policies page for policy review and then schedule a meeting to review and answer any questions they may have: https://www.uwinnipeg.ca/institutional-analysis/policies-and-procedures/index.html

- Respectful Workplace and Learning Environment Policy
- Workplace Accommodation Policy
- Acceptable Computer Use Policy
- Conflict of Interest Policy
- Sexual Violence Prevention Policy
- Privacy Policy
- Mandatory COVID-19 Vaccination Policy
- Key position-specific policies
  (i.e. Purchasing Policy, Travel, Hospitality and Business Expenditures Policy)

- Assign time for them to complete the Accessibility for Manitobans Act (AMA) and Sexual Violence Prevention Policy (SVPP)online training
  (HR will send link to training videos via email for AMA training; SVPP online training is available on the Onboarding and Orientation webpage)

☐ Email information about UW Safe App, Safe-Walk and Safe-Ride Programs

☐ Ask them to sign up for MyHR (online attendance reporting, pay statements):
https://www.uwinnipeg.ca/hr/access-myhr.html

For supervisory/management roles:

☐ Review management responsibilities

☐ Provide basic orientation to relevant collective agreements

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FIRST MONTH CHECKLIST

The goal of the first month is to orientate your new employee to their position, the department and the University. Take time to review the purpose of their position in the unit and broader University, to discuss progress made, and to continue efforts towards integration into the University.

Tips for the first month:

☐ Schedule regular check-ins. Daily check-ins are important over the first few weeks.

☐ Ensure they know where to direct questions (supervisor/co-workers)

☐ Assign estimated deadlines/timelines to tasks if possible

☐ Provide regular feedback and discuss learning curves and roadblocks

During the first month, be sure to meet with them to complete the following:

☐ Establish goals and job expectations
☐ Discuss probationary period (or trial period) and note approximate date of completion
☐ Schedule follow up meetings for regular check-ins during the probationary/trial period
☐ Regularly ask if they have any questions, or if they need additional information, training and/or support

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PROBATIONARY PERIOD CHECK-INS

☐ 30 Day Check-in
☐ 3 Month Check-in
☐ 5 Month Check-in
☐ 6 Month – Probationary Period Review

In addition to regular informal check-ins, formal check-ins at these milestones will ensure employees know what is expected of them and where they stand on performance and expectations. Ideally their progress with be in line with your expectations but if there are any concerns, please contact your HR Consultant immediately for guidance.

It's helpful to schedule these check-ins in advance.

During the check-in:
☐ Review their progress against job expectations and established goals
☐ Identify any areas of additional training that may be required
☐ Ask them if they have any questions about the role, department or University

Suggested questions during check-ins:
- How do you feel about the job so far?
- Does the job differ from what you anticipated?
- What do you enjoy most about your new role?
- Are you facing any challenges?
- Are your responsibilities and priorities clear? If not, which aspects aren't clear?
- Are there any tasks that you need further training on?
- Is there anything else that you need from me and/or your co-workers for you to be successful? (i.e.: communication, support, direction, resources, etc.?)
- Do you have any questions?