SUPERVISOR ONBOARDING TOOLKIT

OFFICE OF BUSINESS AND FINANCE

WESTERN MICHIGAN UNIVERSITY

WELCOME TO WESTERN MICHIGAN UNIVERSITY

Dear Supervisor,

Congratulations on your new hire! We look forward to guiding you through the process of bringing your new employee on board.

This supervisor onboarding toolkit will provide the materials and information you'll need to be successful. We know all of the information provided to you and your new employee can be overwhelming, so this will be a document you can look back on during the first 90 days and beyond. Please also use our _onboarding website_ as needed.

Your _HR representative_ in Human Resources (HR) is available to assist you with anything else you need while onboarding your new employee.

Happy Onboarding,
Office of Business & Finance

WHAT IS ONBOARDING?

Onboarding brings your newly hired talent up to speed with your department's policies, processes, culture, expectations, and day-to-day responsibilities. It also ensures new employees feel welcome, engaged, inspired, and should confirm their choice to join your department and Western Michigan University (WMU).

WHY IS ONBOARDING IMPORTANT?

Onboarding helps you and the University achieve the following objectives:
  o Builds WMU's and the Office of Business & Finance's (OBF) reputation for being a great employer, including great training, clear leadership and a strong organization
  o Helps retain staff members
  o Reduces high turnover costs
  o Increases staff engagement and productivity
  o Builds a cohesive team and fosters collaboration

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ONBOARDING CHECKLIST FOR SUPERVISOR

This checklist was created for the Office of Business and Finance and is for your reference. Not all activities will be relevant for each employee.

BEFORE THEIR FIRST DAY
- o Send an informational letter outlining the specifics of the employee's position, including the department organization chart to show the reporting relationship, salary, etc.
- o Review email from HR, including the Supervisor's Checklist for the New Employee
- o Be familiar with what paperwork a new hire needs to complete
- o Confirm date and time of HR New Employee Orientation session
- o Confirm the employee was able to access their email account
- o Before the start date, send your new employee an email that includes the following:
    - o Date and time to arrive on the first day
    - o What to bring on the first day
    - o Where to report and whom to ask for upon arrival
    - o Transportation and/or parking information
    - o Dress policy
    - o Options for lunch
- o Send an announcement to your department about the new team member and a brief overview of their work experience – encourage staff to send welcome emails
- o Prepare a workspace for the employee
    - o Have office space cleaned, if needed
    - o Set up the phone(s): Determine if your new employee will need a new phone or have an existing one reconfigured
    - o Ensure office supplies are available (pens, paper, post-its, message pads, etc.)
    - o Include a welcome sign on the door or computer, if possible
- o Add employee to appropriate email lists and calendar systems
- o Coordinate with Office of Business and Finance Information Technology (OBFIT) or Facilities Management Information Technology (FMIT) for computer and other technology needs
- o Work with the building coordinator to provide building access
- o Prepare job duties/expectations document *(Onboarding Plan Template)*
- o Select one of your staff members to be a new hire ambassador for your new hire's first few months
- o Set up meetings (one-on-one/small group) with individuals that your new employee should meet – team members can describe their work and how it integrates with the work of the new team member
- o Schedule one-on-one meetings with your new employee to discuss the job description, performance expectations, appropriate attire, time and leave, etc.
- o Create a first-week schedule for new employees (meetings with others, downtime to review orientation materials, tour of building, etc.)

FIRST DAY
- o Department tour – workspace, break room, supply space, bathrooms, etc.
- o Introduce the new employee to colleagues
- o Discuss emergency building plans
- o Discuss time reporting procedures (time sheet, sick or vacation leave, etc.)
- o Review department policies and compliance forms (office hours, dress code, etc.)
- o Issue keys, if applicable
- o Discuss probationary period
- o Approve system access requests
- o If the employee is assigned a vehicle, discuss the necessary training and responsibilities
- o Schedule designated time for the new employee to review, complete, and sign necessary paperwork (I-9 Form, benefit enrollment, etc.)
- o Introduce them to their onboarding ambassador

FIRST WEEK
- o Discuss department mission, goals, and values
- o Review job duties/expectations document *(Onboarding Plan Template)*
- o Discuss assessment criteria and timeline for performance evaluation
- o Discuss workplace training and how it will be administered (online/in person)
- o Discuss relevant recurring meetings
- o Review customer service expectations
- o Assist with questions regarding the employee handbook and onboarding webpage
- o Distribute/review department and University contact lists and organizational charts
- o Add the new employee to your website directory page
- o Order name tags and business cards, if applicable

ONE MONTH
- o Continue to review job duties/expectations document *(Onboarding Plan Template)*
- o Plan *performance management* timeline moving forward

TWO MONTHS
- o Complete *two-month evaluation* for staff compensation system (SCS) employees
- o Continue to review job duties/expectations document *(Onboarding Plan Template)*

THREE MONTHS
- o Continue to review job duties/expectations document *(Onboarding Plan Template)*

FOUR MONTHS
- o Complete *four-month evaluation* for SCS employees

SIX MONTHS
- o Complete *six-month review* for SCS employees

ONBOARDING CHECKLIST FOR EMPLOYEE

This checklist was developed by the Office of the Vice President for Business and Finance and is provided for reference purposes. Not all activities will be relevant for each employee.

BEFORE YOUR FIRST DAY
- o Sign and return the offer letter and any other applicable HR forms
- o Complete *Form I-9*
- o Confirm HR New Employee Orientation date and time with the supervisor
- o Review the *campus map* for building and parking information
- o Review *campus busing schedule*, if needed
- o Check your email account and set up a password (OIT Help Desk: 269-387-4357)
- o Set up *Virtual Private Network (VPN)* and *2 Factor Authentication (2FA)*
- o Obtain *virtual parking permit* and add vehicle(s) by following the *Parking Pass Step by Step Guide*
- o Obtain a *Bronco ID card*
- o Review *benefits information*

FIRST DAY
- o Attend HR New Employee Orientation
- o Meet with your supervisor
- o Meet your colleagues and tour the department – workspace, break room, supply space, bathrooms, etc.
- o Discuss emergency building plans
- o Review time reporting procedures (timesheet, sick or vacation leave, etc.)
- o Review department policies and sign compliance forms (office hours, dress code, etc.)
- o Sign for and receive keys, if applicable
- o Request system access through *GoWMU*
- o Set up voicemail – *Phone User Guide*
- o View Business and Finance *Welcome Video*
- o Meet your onboarding ambassador

FIRST WEEK
- o Discuss department mission, goals, and values
- o Review job duties/expectations document *(Onboarding Plan Template)*
- o Discuss assessment criteria and timeline for performance evaluation
- o Discuss workplace trainings and how those will be administered (online/in person)
- o Discuss relevant recurring meetings
- o Review customer service expectations
- o Review *Employee Handbook*
- o Review *Office of Business and Finance onboarding webpage*
- o Review *Business and Finance Information Technology Website*
- o Review *Information Technology's website*
- o Review department website
- o Complete CMS training and review roles and guidelines, if applicable: *CMS User Guide*
- o Sign up for a *Campus Tour*

ONE MONTH
- o Complete all benefits enrollment
- o Review *Accounting Services training videos*, if applicable
- o Review *HR training resources*
- o Review *Bronco Fix-it/FM Service Center website*
- o Continue to review job duties/expectations document with supervisor *(Onboarding Plan Template)*
- o Establish the timeline for continued performance reviews

TWO MONTHS
- o Complete *two-month evaluation* with the supervisor for staff compensation system (SCS) employees
- o Continue to review job duties/expectations document with supervisor *(Onboarding Plan Template)*

THREE MONTHS
- o Continue to review job duties/expectations document with supervisor *(Onboarding Plan Template)*

FOUR MONTHS
- o Complete *four-month evaluation* with the supervisor for SCS employees

SIX MONTHS
- o Complete *six-month review* with the supervisor for SCS employees

TOOLBOX ADDITIONS A-Z

- o *A-Z Directory*
- o *A-Z Policy Directory*
- o *Athletics*
- o *Building Coordinator List*
- o *Campus Dining*
- o *Campus/Parking Maps*
- o *Design Services - Furniture and Signage*
- o *Environmental Health and Safety*
  - o *Accident Injury form*
  - o *Ergonomic Workspace Guidance*
- o *Logistical Services*
  - o *Mail Services*
  - o *Surplus Sales*
- o *Miller Auditorium*
- o *Meet the President's Cabinet*
- o *Recycling for Faculty and Staff*
- o *Technology Help Desk*
- o *Tuition Discount and Remission*
- o *Writing Style Guide*
- o *Western Wellness*
  - o *Student Recreation Center*
  - o *West Hills Athletic Club*
  - o *Sindecuse Health Center*
- o *WMU Closure Policy*
- o *WMU Public Safety*
  - o *Walking Escorts*
  - o *Lost and Found*
  - o *Bicycle Registration*
  - o *Parking Information*
  - o *Bronco Card*

NEW EMPLOYEE SUCCESS PROFILE

Name _____ Today's Date _____

Position _____ Start Date _____

What are the four competencies to focus on in the first 90 days? (use additional pages if there are more than four)

1. _____

2. _____

3. _____

4. _____

ONE MONTH

Success looks like (what will the employee have learned or done?):

I or others will help our new employee achieve success by:

TWO MONTHS

Success looks like (what will the employee have learned or done?):

I or others will help our new employee achieve success by:

THREE MONTHS

Success looks like (what will the employee have learned or done?):

I or others will help our new employee achieve success by:

ADDITIONAL GOALS AND TRAINING

Goals for the new employee include:

I or others will help our new employee achieve success with these goals by:

The specific training needs or action plans to achieve the goals are:

CHECK-IN MEETING QUESTIONS

Name _____   Today's Date _____

Position _____   Start Date _____

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 mission?

_____

_____

Has the onboarding process been helpful?

_____

_____

What improvements would you like to see in our onboarding process?

_____

_____

Was your in-person/online Human Resources New Employee Orientation helpful? Do you have any questions regarding your benefits? (If so, assist in scheduling with HR.)

_____

_____

Do you have all the work tools you need?

_____

_____

Do you have enough, too much, or too little time to do your work?

_____

_____

Have your co-workers welcomed you?

_____

_____

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 you still need 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 about that I have not asked about?

_____

_____