



# **New Employee Onboarding**

## **MANAGER'S STEPS**

## BEFORE THE EMPLOYEE'S START DATE

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### Schedule and Job Duties

- Contact employee:
  - Confirm start date, time, place, parking, dress code, etc.
  - Send employee [NEW Welcome Letter](#)
- Coordinate with administrative support to ensure initiation of TXST ID & Net ID request, electronic I-9, and PCR. Department Admin should use [New Employee Onboarding: Administrative Steps](#).
- Plan the employee's first assignment.

### Socialization

- Email department/team/functional area of the new hire. Include start date, employee's role, and bio. Copy the new employee, if appropriate.
- Set up meetings with critical people for the employee's first few weeks.
- Arrange for lunch with the appropriate person(s) for the first day and during first week.

### Work Environment

- Put together welcome packet from the department and include: job description, welcome letter, contact names and phone lists, campus map, parking and transportation information, mission and values of Texas State, information about your department, etc.
- Clean the work area and set up work space with supplies.
- Order office or work area keys.
- Order business cards, name tag, or other personalized items.
- Add employee to relevant email lists.

### Technology Access and Related

- Order technology equipment (computer, printer, iPad) and software.
- Work with departmental IT or ITAC to have the system set up in advance.
- Request SAP security for required roles <http://www.tr.txstate.edu/forms/sap-forms.html>
- Arrange for phone installation and/or long-distance codes. <http://www.tr.txstate.edu/services/catalog/phone.html>
- Coordinate with [Access Services](#) if electronic door access is required.
- If new employee will be an Account Manager, complete required form. <http://www.txstate.edu/gao/reporting/forms.html>

### Training/Development

- Plan for new employee to attend NEW I and NEW II. Professional Development will send e-mail invitation directly to new employee regarding NEW II.
- Arrange pertinent trainings required for the job.

## FIRST DAY

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### Schedule, Job Duties, and Expectations

- New employee attends NEW I in the morning.
- Clarify the first week's schedule, and confirm required and recommended training.
- Provide an overview of the functional area – its purpose, organizational structure, and goals.
- Review job description, outline of duties, and expectations. ([UPPS No. 04.04.20](#))
- Describe how employee's job fits in the department, and how the job and department contribute to Texas State.
- Review hours of work. Explain policies and procedures for overtime, use of vacation and sick time, holidays, etc. Explain any flexible work policies or procedures.
- Prepare employee's calendar for the first two weeks.
- Add regularly scheduled meetings (e.g. staff and department) to employee's calendar.

### Socialization

- Be available to greet the employee on the first day.
- Introduce employee to others in the workplace.
- Take employee out to lunch.

### Work Environment

- Give employee key(s). ([UPPS No. 08.02.01](#))
- Provide department or building-specific safety and emergency information.
- Explain how to get additional supplies.

### Technology Access and Related

- Provide information on setting up voicemail and computer.
- Arrange for access to common drives, and coordinate access to systems (SAP, Banner, BDMS, etc.) if required.

## FIRST WEEK

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### Schedule, Job Duties, and Expectations

- Give employee his/her initial assignment. (Make it something small and doable.)
- Debrief with employee after he/she attends initial meetings, attends training, and begins work on initial assignment. Also touch base quickly each day.
- Provide additional contextual information about the department and Texas State to increase awareness of employee's role in achieving organizational goals.
- Explain the Performance Management process and goal-setting process.  
<http://www.hr.txstate.edu/performance-management.html>

### Socialization

- Arrange for a personal welcome from the unit leader.

### Technology Access and Related

- Ensure employee has fully functioning computer and systems access and understands how to use them.

## FIRST MONTH

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### Schedule, Job Duties, and Expectations

- Schedule and conduct regularly occurring one-on-one meetings.
- Continue to provide timely, on-going, meaningful “everyday feedback.”
- Elicit feedback from the employee and be available to answer questions.
- Explain the performance management process and compensation system.
- Discuss performance and professional development goals. Give employee an additional assignment.

### Socialization

- Continue introducing employee to key people and bring him/her to relevant events.
- Meet with employee to review first weeks and answer questions.

### Training and Development

- Ensure employee has attended NEW II.
- Ensure employee has completed online Ethics & Compliance training.
- Ensure employee is signed up for necessary training.

## FIRST THREE MONTHS

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### Schedule, Job Duties, and Expectations

- Continue having regularly occurring one-on-one meetings.
- Meet for informal three-month performance check-in.
- Continue giving employee assignments that are challenging yet doable.
- Create written performance goals and professional development goals.
- Discuss appropriate flexible work options.

### Socialization

- Have employee “shadow” you at meetings to get exposure to others and learn more about the department and organization.
- Have a check-in with the employee and have informal conversation about how things are going.

### Training and Development

- Ask if needed training is completed.
- Provide information about continued learning opportunities through [Professional Development](#), Technology Resources, and other available training programs.

## **FIRST SIX MONTHS**

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### **Schedule, Job Duties, and Expectations**

- Conduct six-month check-in through Performance Management.
- Review progress on performance goals and professional development goals.

### **Socialization**

- Create an opportunity for employee to attend or be involved in an activity outside of his/her work area.

## FIRST YEAR [BETWEEN SIX AND TWELVE MONTHS]

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### Schedule, Job Duties, and Expectations

- Celebrate successes and recognition of employee's contributions.
- Continue providing regular informal feedback; provide formal feedback during the annual review process.
- Have a conversation with employee about his/her experience at Texas State to date:
  - Extent to which employee's expectations of role and Texas State align with reality.
  - Extent employee's skills and knowledge are being utilized and ways to better utilize them; what's working, what they need more of, etc.
  - Begin discussing the year ahead.

### Socialization

- Support and encourage employee participating on divisional or university committees.
- Solicit employee's feedback and suggestions on ways to improve the onboarding experience. Do this one-on-one or with a small group of new employees.

### Training and Development

- Discuss employee's professional development goals and identify relevant learning opportunities.