THE UNIVERSITY OF ALABAMA®

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New Employee Onboarding
Tools & Tips for Managers

Contents

Supporting Your New Employee's Success

This resource guide focuses on the role of the manager and/or hiring department in supporting a new employee's acclimation into their new role.

Onboarding ≠ Orientation

While orientation is a single-day destination, onboarding is a process—*one that takes place throughout your employee's first year in their new role.*

This resource guide outlines the steps necessary for managers to actively engage new employees to:

- ✅ Their new manager (and vice versa).
- ✅ Their new role and responsibilities.
- ✅ Their new department / team.
- ✅ The University and our culture and mission.
- ✅ The tools, processes, and resources necessary for success.

Our onboarding process spreads across the employee's first year and consists of four phases. Goal setting and progress reviews should be emphasized throughout each phase, encouraging their sustained implementation, and promoting measurable employee development.

The onboarding phases are:

Phase 1	0-1 month
Phase 2	1-3 months
Phase 3	4-6 months
Phase 4	7-12 months- Coming Soon!

Keys to Success

1 Use this guide to lay out your employee's first year. Included are details of each phase, roles, responsibilities, and best practices.

2 Check out our [Manager Learning Plan](#) in LMS for training sessions that provide important information for managing employees.

3 Stick to the plan. Continue to follow through with check-in conversations, goals, and milestones all the way through the first year.

Phase 1: 0-1 Month

››› *Before the first day*

Logistics Confirmation Call

When conducting this call, plan to discuss:

- ✓ Scheduling the pre-employment appointment.
- ✓ Submitting the required background check authorization.
- ✓ Directions on where to park and go after New Employee Orientation.
- ✓ The required dress code, when appropriate.
- ✓ Contact information in case of any additional questions.
- ✓ Discuss UA's pay schedule. NOTE: New Hire ePAs received by Payroll less than five business days prior to the pay date will not receive payment until the next regular pay date as payroll processing will already be in progress.

Complete ePA and Submit Access Requests

These steps are essential for a smooth onboarding experience.

- ✓ Monitor your email for the employee's CWID
- ✓ Submit an ePA at least seven business days prior to the start date, if applicable.
- ✓ Submit UA system access requests (Banner, PageUp, OnBase, UA e-Time, etc.) as well as department-managed systems

Setting Up New Employee's Work Area

What is the ultimate goal? Your employee is ready to jump right in. If applicable, prep:

- ✓ Phone & voicemail
- ✓ Computer & printer access
- ✓ Nameplate or nametag
- ✓ Technical or trade tools
- ✓ Software

Prepping Your Team

Ensure your team is aware of the new employee's role and responsibilities, and how those align and support the team's collective goals.

Additional Recommendations

Prepare First Day & Week Agenda
Be sure to include time for a departmental orientation. Discuss department procedures (requesting time off, appropriate attire, lunch breaks, etc). Give new employee department/college tour and introduce to co-workers. Review position description, job competencies, expectations. See page 8 for a sample agenda.

You'll know you succeeded when:
- You've let your new employee know what to expect on their first day
- You've submitted the ePA timely, if applicable
- You've set up the new employee's workstation

Phase 1: 0-1 Month

⟫⟫⟫ *First Day*

Tips for a Great First Day

- ✓ Greet your new employee at the door
- ✓ Conduct the department orientation
- ✓ Introduce to the team and/or key roles in the department
- ✓ Provide a departmental contact list, including HR Business Partner
- ✓ Provide tasks, outline responsibilities, and assign goals— these should be particularly focused on short-term items, such as "Complete the required training on the Learning Management System by the end of next week."
- ✓ Discuss non-exempt timekeeping and pay schedule. NOTE: New Hire ePAs received by Payroll less than five business days prior to the pay date will not receive payment until the next regular pay date as payroll processing will already be in progress.

⟫⟫⟫ *Week One*

The Week One Check-in

Have a conversation at the end of the first week. Good things to discuss are:

- ✓ The culture of your team.
- ✓ How things are achieved on your team, and the competencies/behaviors of success.
- ✓ Confirm myBama is set-up, parking permit and Action card.
- ✓ Confirm all applicable systems can be accessed.

Some helpful questions are:

- ? "What additional direction, clarity, or resources can I provide?"
- ? "What do you see right now as high priorities? Low priorities?"

⟫⟫⟫ *One Month*

The 1-Month Check-in

Have this conversation at the end of the first month.

You might ask things like:

- ▪ "Tell me about your current workload. Of the projects you're working on, what is most engaging? What type of work/project would you find most intriguing going forward?"

At this point, you should also:

- ▪ Check in with earlier goals and review progress, questions, or concerns.
- ▪ Establish new goals, this time more geared toward longer-term items (like work projects/deliverables, development).
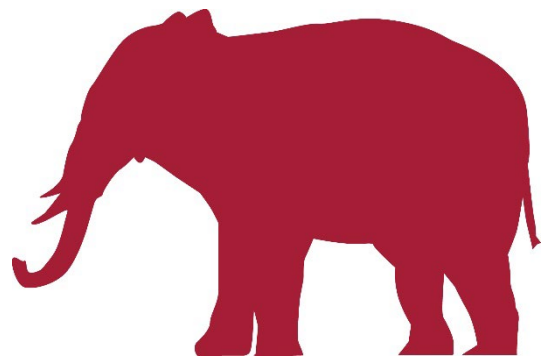
You'll know you succeeded when your new employee understands and is able to articulate the expectations of job role, and mission of UA and respective department/division.

Phase 2: 2-3 Months

The 60- and 90-Day Check-In

In these check-in conversations, you'll want to:

✓ Check in with earlier goals and review progress, questions, or concerns.

Key Questions for Your Check-Ins

- "Have you observed any practices or approaches that have spurred ideas for process improvement?"

- "What additional direction, clarity, or resources can I provide?"

- "Tell me about your current workload. Of the projects you're working on, what is most engaging? What type of work/project would you find most intriguing going forward?"

Other Ways to Help

✓ Evaluate familiarity with department and organizational goals.

✓ Get feedback from employee on job satisfaction, or any issues/concerns so far.

✓ Identify at least 3 accomplishments (and provide praise).

✓ Identify at least 3 opportunities for improvement and create an action plan with the employee.

✓ Begin discussing long-term goals.

Additional Recommendation

Document your Goals and Expectations for your New Employee
Short-term (department checklist of activities for your new employee's first days) and long-term (a prioritized list of mid-year/annual goals for the new employee) are vital to kick-starting and maintaining productivity; and SMART goal setting is the most effective. Be prepared to discuss how your new employee fits into departmental strategic goals.

You'll know you succeeded when you review goals and progress in the 60- and 90-day check-ins.

# Phase 3: 4-6 Months

Six-Month Introductory Period Review

The introductory period provides an opportunity for employees to demonstrate their ability and probability of successful performance.

The six-month Introductory Period Review Form should be used to review the employee's job performance prior to the end date of the introductory period. This process should provide the employee feedback on their performance, to include any areas in need of improvement. Failure to complete this process by the introductory period end date will result in the assumption that the employee's introductory period has been completed satisfactorily.

Please contact your assigned HR Business Partner for any needed guidance on this process at least one month before the end of the introductory period if the employee will not be retained.

NOTE: If your new employee is coming from another UA department and they have already gone through a six-month introductory period, they will not go through one again unless they are changing from a non-exempt to exempt position. If that is the case, you are encouraged to do a six-month check in conversation.

You'll know you succeeded when you deliver feedback to your new employee at the Six-Month Introductory Performance Review
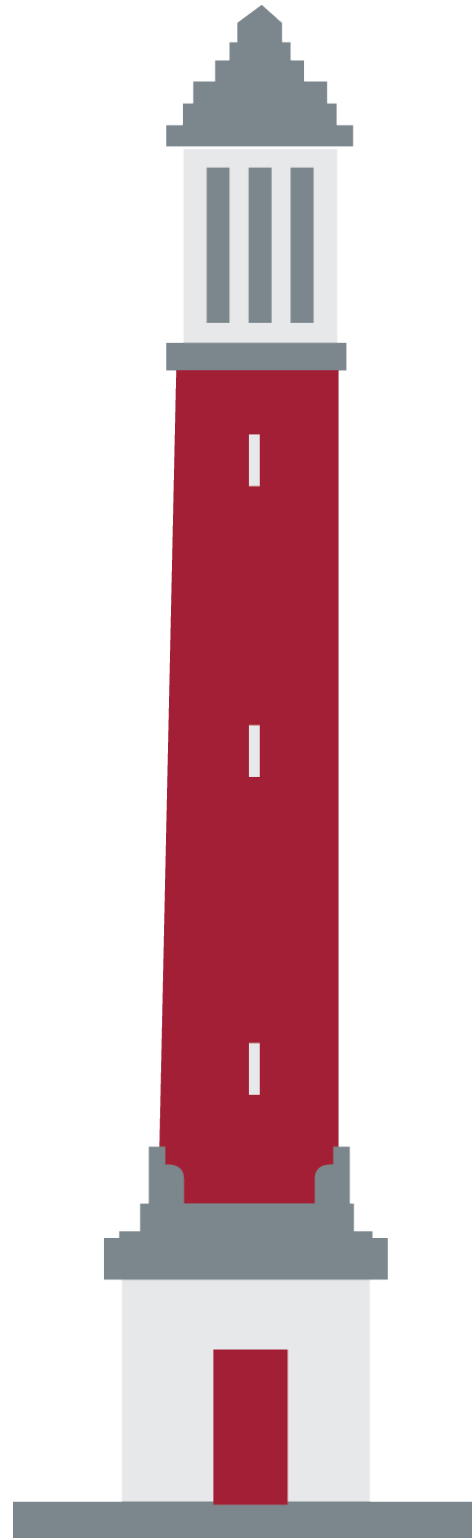
Appendix: New Employee Checklist for Managers

0 − 1 Months: Before the first day

☐ Complete logistics confirmation call with employee to discuss scheduling pre-employment appointment, where to park on the first day, dress code, pay information, etc. Confirm applicant has received background check email and has submitted the required information. Failure to do so timely could delay the start date.

☐ Monitor your email for the employee's CWID.

☐ Complete and submit ePA at least seven business days prior to the start date.

☐ Confirm your employee attended a pre-employment appointment with the HR Service Center.

☐ Ensure all resources and tools are in place. Set up your employee's workstation & submit system access requests.

0 − 1 Months: On the first Day

☐ Ensure employee's attendance at New Employee Orientation.

☐ Ensure employee's attendance at department orientation and establish short-term goals. Discuss department procedures (requesting time off, appropriate attire, lunch breaks, etc). Give new employee department/college tour and introduce to co-workers. Review position description, job competencies, expectations.

0 − 1 Months: After the first day

☐ Begin on the job training to include goal setting during the first week.

☐ Have a check in conversation with your employee at the end of the first week.

☐ Have a check in conversation with your employee at the end of the first month.

2 − 3 Months

☐ Confirm that your new employee completed required compliance training at the 60-day mark.

☐ Have a check-in conversation with your employee at the 90-day mark.

4 − 6 Months

☐ Conduct the six-month Introductory Period Review on or before the six-month mark.

7 − 12 Months

☐ Coming Soon!

Appendix: Department Orientation Guide

New Employee Orientation

[New Employee Orientation](#) provides a comprehensive "first look" at UA, its core values, essential expectations and important resources applicable to all employees. New employees will be scheduled to attend on their first day during their onboarding appointment.

Your employee's first day, however, should also consist of an orientation relevant to his/her day-to-day work environment. This provides an opportunity to cover your department's specific guidelines, expectations, and norms, and it also gives you another chance to build a relationship with your new employee. Below is a sample agenda for ideas as you create and conduct your department orientation.

Sample Agenda

Welcome
- Greeting by department senior leadership
- Review department's mission, vision, and culture
- Discuss history of department describing significant events, accomplishments, alumni, foundational leaders, etc.
- Review organizational chart, discussing who plays what role
- Conduct department tour
- Discuss points of security access and severe weather safe zones

Department/Division Strategic Plan
- Overview
  - Organizational chart
- Strategies or plans
  - Opportunities for new employees to be involved in the realization of plans
- Who plays what role?

Overview of Policies
- Department/division policies
  - Timekeeping (exempt vs. non-exempt)
  - Dress code
  - Time off or unexpected absences, such as how sick time is handled
  - Overtime policies
  - Six-month introductory performance review period
  - Lunches/lunch breaks
- Duty to Report and Non-Retaliation Policy

Employee Development
- Performance Reviews
  - Format, individuals involved, scoring/ measuring criteria, purpose, frequency
- Professional Development
  - How does your division/department help employees pursue (or identify) career goals?
- Department-specific trainings
  - How can employees get more training within their role?

Additional Recommendations
- Take advantage of space other than traditional lecture-style setup, if possible.

- Provide light refreshments for groups.

- Create a networking or "icebreaker" activity to help new employees network.

Appendix: The Task List for New Employees

1

Schedule Pre-employment Appointment
New hire schedules an onboarding appointment *prior to their start date* through a link in their offer letter.

2

Complete Section 1 of I-9
New hire completes Section 1 of the I-9 through a link in their offer letter *prior to their start date*.

3

Review and Complete "Before your first day" Tasks in PageUp
These include reviewing the Benefits Summary Guide, Parking on Campus, Voluntary Self-Identification Forms and the Health Insurance Exchange Notice.

4

Set-up myBama and Duo
New hire will receive an email from HR Learning and Development on Friday before their start date with instructions on how to set-up myBama and Duo.

5

Attend New Employee Orientation
Orientation will be held on the new hire's first day from 8:30 AM - 11:30 AM at the Employee Resource Center located at 1515 Flint River Drive. New hires also register for a temporary parking pass and set-up their Action Card at New Employee Orientation.

6

Review and Complete "Your First Week at UA" Tasks in PageUp
These tasks include Setting up your myBama portal, TRS and ERS Retirees Information, Banner Self-Service Direct Deposit, and Emergency Alerts.

7

Review and Complete "Your First Month at UA" Tasks in PageUp
These tasks include Compliance Training and Benefits Enrollment.

> **Managers Tips/Actions:** You should remind new hires about **Task 1** and **Task 2** during your logistics confirmation call. You should confirm that the new hire has completed Task 1 and Task 2 *prior to their start date.*

Appendix: Overview of the Hiring Process

Step 1	**Hiring Department** ▪ Create an online job Requisition completing all applicable fields and submit the requisition through the appropriate approval process by selecting and entering in the correct approval names. ▪ If the position is to be advertised outside of the UA's website include a copy of the position advertisement in the Job Requisition along with the venues and dates of publication.
Step 2	**Department Head, Director, Dean and Vice President Review** ▪ Review and approve, as appropriate, the Requisition. Submit it to the next approval level.
Step 3	**Talent Acquisition Specialist** ▪ May contact the Hiring Department to finalize the search plan (advertising and search committee) and/or open and closing date of job. ▪ Will approve the requisition which posts the position on the UA Recruitment website as of the Actual Open Date. Will post the requisition to the UAStaffJobs social media accounts, if appropriate.
Step 4	**Hiring Department** ▪ Posts approved job announcement on any advertising venue outside UA's website using the format listed in guidelines for advertising jobs.
Step 5	**Talent Acquisition Specialist** ▪ Verify applicants that apply before the job close date meet minimum qualifications as advertised, obtains additional information if needed. For EEO-1 jobs, review will be completed by Provost. ▪ Change the status of the applicants to "Forwarded to Department" or "Not Selected for Interview" as appropriate.
Step 6	**Hiring Department** ▪ Review applications via the online system. ▪ Run and review the EEO Report to determine if a good, qualified, diverse applicant pool has been obtained. If not achieved, determine additional recruitment efforts and, if needed, contact the Talent Acquisition Specialist. ▪ Determine which applicants are to be interviewed, changes the status of each applicant to be interviewed to "Selected for Interview."
Step 7	**Hiring Department** ▪ Conduct interviews of selected applicants and change status of interviewed applicants to "Interview Complete" and status of applicants not interviewed to "Not Hired-Interview' with appropriate reason code. ▪ Change status of final applicant to "Create Offer for Approval" and complete Offer Card information and submit through the approval process by selecting the appropriate number of system approvers.
Step 8	**Talent Acquisition Specialist** Review the Offer Card for any salary equity issues. If further approval is needed, will update number of offer card approvers.

Step 9	**Department Head, Director and Dean** Review Offer Card for appropriate justifications and approve, if appropriate, or submit the Offer Card to the next approval level by clicking on the "approve" button.

Step 10	**Vice President / President** ▪ Review Offer Card for appropriate justifications, approvals and recommendations, and approve. ▪ If Vice-President/President does not approve the Offer Card; the Offer Card will be declined until additional information can be provided by the Hiring Department.

Step 11	**Talent Acquisition Specialist** ▪ Once appropriate approvals have been received; the Talent Acquisition Specialist will create the offer letter and will send to the hiring department for approval. ▪ Once the offer letter wording is approved, the Talent Acquisition Specialist will approve the Offer Card and will change the applicant status to "Online Offer Made."

Step 12	**Hiring Department** ▪ Change the status of remaining candidates to "Not Hired – Department Reviewed" or "Not Hired – Interviewed" with the appropriate not hired reason code.

Step 13	**Talent Acquisition Specialist** ▪ When the applicant moves to a status of "Offer Accepted Form Complete," the automated CWID process will engage the next day and will change the applicant status to "CWID Assigned" and will add the CWID to the offer card and will email the CWID to the applicant and the Hiring Manager.

Step 14	**Hiring Department** ▪ Submit ePA if individual is not a true new hire that will be picked up by the automated ePA process. Remind applicant to register for their onboarding appointment before their first day if they are a new hire.

Step 15	**Talent Acquisition Specialist** ▪ When the CWID is assigned, the Talent Acquisition Specialist will submit the applicant for the background check.

Step 16	**Hiring Department** ▪ Notify applicant to look for email from Talent Acquisition Specialist with subject "Online Request for Authorization to Conduct a Background Check." This email typically goes to a junk/spam folder. Make sure the applicant uses a PC with Google Chrome and not a mobile device to complete the authorization form. The background check authorization form has several pages with page numbers listed at the top of the form.

Step 17	**Talent Acquisition Specialist** When all required checks for the job is complete, the Talent Acquisition Specialist will change the applicant status to "Contingent Offer Checks Complete." This will send an email to the applicant and hiring manager to let them know all required checks are complete. The Talent Acquisition Specialist will then change the status to "Hired."
Step 18	**Hiring Department** ▪ Dispense of any remaining applicants that have not been moved to "not hired."
Step 19	**Talent Acquisition Specialist** ▪ Update applicant status to "ePA complete" once the ePA is approved. Update requisition to "Filled" once all applicants have been dispensed.