



ON-BOARDING TOOLKIT

Guidance for the
Hiring Manager



Dear Manager,

Congratulations on the successful hire of your new colleague. We understand that this is a new beginning for both you and your colleague, and the possibilities are endless!

The key to the success of your new colleague is, in part, providing a suitable on-boarding experience. Human Capital Institute research shows that providing on-boarding throughout an employee's first 90 days greatly increases the likelihood of employee retention and productivity.

We are certain that you have already completed a number of orientation activities, and in addition to those, we would like to provide you with a few more ideas and tools to help you welcome, orient, and retain your new employee.

What is On-boarding?

- It's a support process designed to manage a variety of tasks and requirements initiated once a new hire has accepted a position.
- It's a supplement to the existing orientation process that is designed to provide specific and customized information about the university culture and tools to help the new employee navigate and be successful at Hopkins.
- It's a way to get your newly hired talent up to speed with the policies, processes, culture, expectations, and day to day responsibilities of your department/unit.
- It's a way of making newcomers to the environment feel welcomed and excited, confirming for them the reasons they joined your department/unit and the Johns Hopkins University, especially in the early days of the transition and at the onset of new challenges.

An effective on-boarding process:

- Builds JHU's and your department/unit's reputation for being a thoughtful employer, with great training, clear leadership, and a strong organization
- Helps to retain your senior staff members
- Reduces high turnover costs
- Supports new colleagues and moves them to efficient productivity levels quickly
- Builds better team relationships across the department/unit

** This toolkit is intended to be an additional resource to your department or division's existing orientation materials. If your department or division already has a checklist or program, it is encouraged that you use the existing resource, and utilize this toolkit as an additional resource.*

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The following tool bar appears at the top of various documents in this kit. It shows when to use a specific document or worksheet-- prior to the new employee's arrival, during the first 30, 60 or 90 days, and beyond the 90-day period.

NEW EMPLOYEE DAYS	< 0	0-30	30-60	60-90	90 +
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Setting the Stage

NEW EMPLOYEE DAYS	< 0	0- 30	30- 60	60-90	90+
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Accepting the offer to join your organization was likely a big decision for your new employee. Once an employee accepts a position, the days or weeks up to that first day are critical in building a positive impression and relationship. The ideas below will help ensure that the connection you build with your new employee is strong from the start.

- Shortly before the start date, send your new colleague an email or letter that includes the following:
 - Date and time to arrive the first day
 - What to bring on the first day to complete the I-9 and W-4 forms
 - Location to report to and who to ask for upon arrival
 - Transportation and/or parking information
 - What to expect during the first days on the job (including a schedule of the first few days if possible)
 - What to wear
 - Options for lunch (or better yet, arrange to take the new employee out to lunch with you and/or a group of colleagues)

For a [sample letter](#), look in the resource section of this toolkit.

- If there is a long period of time between the offer and start date, stay in regular communication with your new employee via e-mail. Send a packet of introductory information about their position, your department and the university. You can also collect brochures and information about University programs and services to send to your new employee to review on his or her own time (i.e. the Johns Hopkins Magazine, the Gazette).
- Send an informal announcement to your department about your new hire and her background. For a [sample](#) letter, look in the resource section of this toolkit.
- Obtain a JHED ID for your new hire through your IT administrator

- Meet with department/unit HR or payroll coordinator to ensure you know what paperwork a new hire needs to complete, using the Internal Service Request (ISR) process
- Select one of your new hire's colleagues to be a "buddy" for the first few months on the job (see the buddy checklist in this toolkit). Send the new hire the name and contact information of the buddy so that they can be in touch.
- Set up appointments with individuals that your new hire should meet early on (colleagues within your organization and individuals that they will interact and work with).
- Set aside time in your calendar to make sure you're available for the first few days and weeks of your new hire's tenure.
- Set up new hire's work stations, including her desk and/or office, computer, etc. First impressions count, so providing new hires with a clean desk in a cubicle or office that is in "move-in" condition will be a positive step in this new relationship that will make the individual feel valued and welcomed (see buddy checklist in this toolkit.)
- You may want to include a sign on the new hire's door or workstation welcoming him to the team, or have flowers or a plant to make the workstation more inviting.
- Set up phone(s): Determine if your new hire will need a new phone, or have an existing one reconfigured. Also be sure that her new voice mailbox is set up on the employee's first work day.
- Have building keys or other access methods ready.
- Have mailboxes marked (if applicable)
- Make sure necessary supplies are available: Plan ahead to insure that new hires have all the required office supplies on their first day, including pens, paper, post-its, message pads, office keys, etc.
- Order business cards if necessary/ possible. Publication Services has [*u* *web-based ordering process.*](#)
- Make sure new staff hires are added to appropriate email lists and calendaring systems.

- Create a first-week schedule for new hires so that they have something to do that is meaningful and helps her hit the ground running. The schedule should include a balance of time with others, down time, and time on their own to read orientation materials or complete other orientation-related tasks. Consider including some or all of the following:
 - 1:1 or small group meeting with other team members. During these meetings, team members might describe their work and how it integrates with the work the new team member does.
 - 1:1 meetings with you to discuss job description, performance expectations, appropriate attire, time and leave, etc.
 - Designated times for the new hire to review the online NEO (New Employee Orientation) and online Benefits Orientation.
 - Meetings with other key colleagues.
 - Time alone at their workstation so they can digest all the new information and make notes about what they've learned in meetings.
 - Tour of campus or larger work environment.

Overview Checklist for the New Employee

NEW EMPLOYEE DAYS	< 0	0- 30	30- 60	60-90	90+
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TO BE FILED IN DEPARTMENTAL PERSONNEL FILE BY THE MANAGER

Employee _____

School/Division _____

Supervisor _____

Department _____

ACTION ITEMS FOR EMPLOYEE

EMPLOYEES: Check off items as you complete each one.

- Find out your Employee's Identification Number (JHED ID): -

- Complete online New Employee and Benefits Orientation using the directions you received from your divisional HR Office. [Download instructions on how to access the orientation e-courses.](#)
- [Order University business cards](#) (if applicable)

INFORMATION COVERED IN ONLINE NEO (New Employee Orientation)

- The history of Hopkins
- Diversity
- Service Excellence
- Security Information
- Occupational Health and Safety
- Other related policies and procedures

TOPICS TO BE COVERED BY DEPARTMENT/SUPERVISOR

SUPERVISORS: Check off items as you address them with your new employee. For examples of existing checklists, look in the [resource section](#) of this toolkit.

- | | |
|--|---|
| <ul style="list-style-type: none"> <input type="checkbox"/> Terms of employment (employment program/probationary period/salary) <input type="checkbox"/> Job duties and performance expectations <input type="checkbox"/> Performance appraisals <input type="checkbox"/> Work schedules, breaks and overtime <input type="checkbox"/> Time and leave reporting <input type="checkbox"/> Labor contract/dues obligation (bargaining unit) <input type="checkbox"/> Professional Staff Development Programs <input type="checkbox"/> Paydays and how to arrange direct deposit <input type="checkbox"/> Types of leave and accrual rates <input type="checkbox"/> Requesting time off | <ul style="list-style-type: none"> <input type="checkbox"/> Function of department/organization <input type="checkbox"/> Department/organization chart <input type="checkbox"/> Interdepartmental relationships <input type="checkbox"/> Departmental safety plan <input type="checkbox"/> Equipment use and access <input type="checkbox"/> Reference Station Location <input type="checkbox"/> Telephone use/etiquette/voicemail/directory <input type="checkbox"/> E-mail account and usage tips <input type="checkbox"/> Emergency contact information <input type="checkbox"/> Inclement weather procedures/policies |
|--|---|

Employee's Signature _____

Date _____

Supervisor's Signature _____

Date _____

*Checklist for New Employee's Buddy
(Optional)*

NEW EMPLOYEE DAYS	< 0	0- 30	30- 60	60-90	90+
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BEFORE NEW TEAM MEMBER STARTS

- Work space clean, including computer, phone, trash can, etc. has been set up
- E-mail address is set up (through IT)
- Set up mailbox- if one exists
- Get copy of departmental handbook (if applicable)
- Arrange for any welcoming items or events (door sign, welcome reception, etc.)

WEEK ONE

- Meet and greet on day one
- Walk around and tour areas of the facility
- Show work space/desk
- Assist new employee with any questions he or she may have
- Introduce new employee at meetings, breaks, lunch, etc.
- Assist the new hire with understanding of acronyms typically used in your department. You may be surprised how foreign Hopkins speak can sound to a new hire

DURING THE REMAINDER OF THE 1ST MONTH

- Have informal check-ins with new staff member to see "how it's going" for them
- Review what has already been covered in the above checklist if necessary

AT THE END OF THE 1ST MONTH

- Buddy relationship may continue informally as desired or needed

NOTES

Manager's On-boarding To Do List

NEW EMPLOYEE DAYS	< 0	0- 30	30- 60	60-90	90+
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BEFORE NEW TEAM MEMBER STARTS

- Work space, including computer, phone, etc. has been set up
- e-mail address is set up (through IT)
- Set up mailbox if one exists
- Provide a copy of departmental handbook (if applicable)
- Arrange for any welcoming items or events (door sign, welcome reception, etc.)

WEEK ONE

- Meet and greet on day one
- Show work space/desk and walk around and tour areas of the facility
- Introduce new employee to [myJohnsHopkins](#) and [myLearning Catalog](#)
- Introduce new employee at meetings, breaks, lunch, etc.
- Review Hopkins communications:
 - E-mail
 - [Johns Hopkins Magazine](#)
 - [JHU Gazette](#)
 - [University Announcements](#)
 - [University Calendars](#)
 - Internet
 - [Faculty, Management and Staff Development catalog](#)
 - Team/department/unit meetings
 - Other regularly scheduled meetings
- Explain regular hours, break times for staff
- Show how to log-in and check e-mail
- Show how to use phones and check voicemail
- Have lunch with new employee on day one
- Explain use of refrigerator, oven, microwave, recycling, etc.
- Fire alarm and evacuation procedure
- Review and clarify all appropriate safety procedures
- Show how to use E-210 and [myJohnsHopkins](#) on the web
- Review all office equipment (photocopier, fax machines, etc.) and ordering of supplies
- Provide a list of acronyms typically used in your department. You may be surprised how foreign Hopkins speak can sound to a new employee

DURING THE REMAINDER OF THE 1ST MONTH

- Schedule a 15-minute meeting once a week with new staff member to check in on “how it’s going”
- Review what has already been covered in the above checklist

DURING THE FIRST 30 TO 60 DAYS

- Ensure that you have arranged for proper training for your new employee. Much of the training that is needed will more than likely be conducted by you or an employee in your department one-on-one with the new hire.
- [Talent Management and Organization Development](#) (TMOD) provides a comprehensive course listing to help individuals become effective managers, supervisors and team members. You can also find a course catalog at [myLearning](#). Some departmental training topics include:
 - SAP training
 - Compliance, Policies and Procedures
 - Information Technology
 - Integrated Student Information System (ISIS)
 - Laboratory Excellence
 - Professional Coding for Medical Specialties
 - Management and Supervisory Training
 - Leadership Development
- Continue meeting with your team member on a regular basis. The first week for a new employee is often full of meetings, information gathering and tours. However, your new hire will probably still feel “new” for some time, so it’s important that you keep a line of communication open with him or her and continue to structure some time for questions, information sessions, and training. We’ve provided sample questions to ask your new team member at these meetings (see New Employee Check-In Meeting Questions on the next page).

DURING THE FIRST SIX MONTHS TO ONE YEAR

- Regularly meet with new employees to set goals, review performance, and give feedback. Also, ask for feedback about how things are going and if they’re getting the support they need from you and others.
- Ask new hires if there are learning and professional development opportunities that seem interesting to them. Discuss which ones are appropriate and show them how to enroll
- Conduct evaluation period/trial period formal review
- Encourage your new team member to get involved with the community. They could do this by talking to colleagues about campus groups, publications and other professional activities and resources that are available.

*Sample New Employee Check-in Meeting Questions
For Managers*

NEW EMPLOYEE DAYS	< 0	0- 30	30- 60	60-90	
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Name _____

Today's Date _____

Position _____

Start Date _____

(To be completed by the manager)

How is your job going?

Is it what you expected when you were hired?

Any surprises? If yes, what were they?

Has training been helpful?

What training would you add?

Has your Buddy been helpful?

Can you suggest any changes for the Buddy program?

Do you have all the equipment and/or work tools you need?

Do you know where you stand in terms of your progress since you started working?

How are your relationships with your co-workers?

Was the online New Employee Orientation helpful?

Do you have suggestions on how to improve the New Employee Orientation?

Was the online Benefits Orientation helpful? Do you need any additional information regarding your benefits?

Do you have suggestions on how we could improve our work across the department?

Are there any questions you still have/ is anything still unclear?

Is there something we should be providing to new employees that we have missed?

Do you feel out of the loop about anything?

Is there anything that you need and to which you don't have access?

Do you have any general suggestions?

Do you have any general work needs that haven't been met?

Is there anything you would like to tell me that I have not asked you?

New Employee Success Profile

NEW EMPLOYEE DAYS < 0 0- 30 30- 60 60-90 90+

Name _____ Today's Date _____

Position _____ Start Date _____

CORE/FUNCTIONAL COMPETENCIES

1. _____
2. _____
3. _____
4. _____

Use additional pages if there are more than 4 competencies to focus on in the first 90 days.
(Completed by Manager)

FIRST 30 DAYS

Success looks like . . . (What will the new employee have learned or done?)

I or others will help our new team member achieve success by . . .

FIRST 60 DAYS

Success looks like . . .

I (or others) will help our new team member achieve success by . . .

FIRST 90 DAYS

Success looks like . . .

I (or others) will help our new team member achieve success by . . .

ADDITIONAL GOALS AND TRAINING

Other goals for the new employee include . . .

I (or others) will help our new team member achieve success with these goals by . . .

Specific training needs or actions to achieve the goal are . . .

**Both the new employee and manager should initial and date this form.
Keep form in departmental personnel file.**

	30 Days	60 Days	90 Days
Manager's initials	_____	_____	_____
Employee's initials	_____	_____	_____
Date	_____	_____	_____

Recognition Profile

NEW EMPLOYEE DAYS < 0 0- 30 30- 60 60-90 90+

Please complete this form to tell us about you. Share only what you are comfortable with.

Name _____ Position _____

Today's Date _____ Start Date _____ Birthday (Month/Day) _____

(Optional: To be completed by new employee)

FAVORITES:
Beverage
Book/Author
Color
Food
Hobby/sport/interest
Movie
Restaurant
Snacks
Sports team
Type of Music
Type of Art

Most Avoided foods
Family (Optional)
My hero or someone I admire
Pet(s)? (Type/breed/name)
Hobbies/Interests

What are your personal goals (educational, travel, home related, etc.)?

What types of recognition or praise do you like best (public, private, written, verbal, formal or informal)?

What form of recognition motivates you the most (gift card, time off, chocolate, coffee, tea, meaningful note, more flexibility/opportunity)?

On-boarding Reminders

NEW EMPLOYEE DAYS	< 0	0- 30	30- 60	60-90	90+
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You want your new hire to be excited about his/her new job. Here are some things to keep in mind as you bring your new hire on to your team.

Be sure that you don't:

1. Forget to create or assign a work space for your new employee.
2. Schedule the new employee to start work while her supervisor is on vacation.
3. Leave the new employees standing in the company reception area for a half hour while reception staff tries to figure out what to do with them.
4. Leave the new employee at her work station, to manage on her own, while coworkers pair up and head out to lunch.
5. Leave the new employee in the lobby to read and sign-off on a 100 page Employee Handbook.
6. Show the new employee his office without introducing him or her to coworkers or assigning a mentor.
7. Assign the new employee to a mentor who has a major, career-impacting deadline, in three days.
8. Assign the new employee to a Buddy who is also your most unhappy, negative, team-bashing staff member.
9. Assign the employee "busy work" that has nothing to do with his or her core job description, because you are having a busy week.
10. Leave the employee to find their own way without help or support from you

Adapted from Susan M. Heathfield's *Top Ways to Turn Off a New Employee

Resources

On the Web

- JH University website: <http://jhu.edu>
- JH Medical Institutions website: <http://www.jhmi.edu/>
- JHU Human Resources: <http://www.jhu.edu/hr/>
 - JHU Work, Life and Engagement : <http://hopkinsworklife.org/>
 - Housing and Relocation
 - FASAP (Faculty and Staff Assistance Program)
 - Childcare Assistance
 - Live Near Your Work Program
 - Pre-Retirement Resources
 - Many other services for faculty and staff of Johns Hopkins
 - JHU Personnel Policy Manual:
<http://hrnt.jhu.edu/elr/pol-man/section9.cfm>
 - Includes the University Confidentiality Policy
- Orientation for New HR Practitioners:
<http://training.jhu.edu/html/Test/NEWHR/>
Provides an overview of HR, including:
 - Organizational chart
 - Employee and Labor Relations
 - Worklife and Engagement
 - Compensation/HR Metrics/HRIS
 - Benefits Administration/ HR Shared Services
 - Employment and Recruitment
 - Policies and Procedures
 - Office of Institutional Equity (OIE)
 - Controller's Office
 - Safety and Emergency Resources
 - Faculty & Staff Assistance Program(FASAP)
 - Training and Education
 - Maps, Parking and Shuttle Schedules
- HIPAA Compliance:
<http://www.hopkinsmedicine.org/administrative/hipaacompliance.html>

- Joint Commission:
<http://www.hopkinsmedicine.org/jhhr/Managers/JCAHO.html>
- Environmental Safety:
http://www.hopkinsmedicine.org/hse/environmental_safety/index.html
- Occupational Safety and Health:
http://www.hopkinsmedicine.org/hse/occupational_health/index.html
- JHU Safety Office:
<http://www.jhu.edu/safety/>
- Talent Management and Organization Development: <http://tmod.jhu.edu>
- JHU Benefits: <http://hrnt.jhu.edu/benefits/>
- List of Hopkins' Academic Calendars: <http://tinyurl.com/ouve5x>
- JHU Holiday Calendar: <http://tinyurl.com/qqf4fz>
- SAP Training Environment – this one is for SAP instructors only at this time -
<https://h1tr.erp.johnshopkins.edu/irj/portal/>
- Knowledge Network -
<https://collaborate.johnshopkins.edu/sites/SAP/knownet/Pages/default.aspx>
- *myLearning* @ johnshopkins -
<https://lms.learnshare.com/authenticate/shib/default.asp>
- JHU SAP Program Sequence and Curriculum -
<http://training.jhu.edu/html/Financial/Status204.pdf>
- Desktop Support Technology –Bomgar- end user url – <http://streaming.jhu.edu>
- Synchronous Learning Technology – Adobe Connect - FastFacts -
<http://hopkinsfastfacts.org/>
 - Learning and Development Website
<http://tmod.jhu.edu/LearningDev.html>

Resources

Sample On-boarding Checklist

- [Johns Hopkins University \(Human Resources\) Checklist](#)

** If your department or Division already has a checklist, it is encouraged that you use the existing resource.*

Sample New [Employee Announcement Letter to Team](#)

Sample [Welcome Letter for New Employee](#)

New Employee Announcement Template

(To coworkers from supervisor)

Dear [department name] team:

I am delighted to announce that [new employee's name] will be joining our department as [job title of new employee] on [start date].

[Name of "Buddy"] will be assigned to help [new employee's first name] during the orientation process. However, all of us will be responsible for helping [new employee's first name] become a productive member of our team.

Please join me in extending a heartfelt welcome to [new employee's first name] on [his/her] first day.

Sincerely,

[Manager's/Supervisor's Name]

*Adapted from Jean Barbazette, *Successful New Employee Orientation* published by Pfeiffer & Associates, copyright Jean Barbazette, 1994 www.thetrainingclinic.com

New Employee Welcome Letter Template

Dear [Employee's first name],

Welcome to Johns Hopkins and the [department name]! I am delighted you are joining us as a [new employee's job title]. Your role is critical in fulfilling the mission of our department and Johns Hopkins University.

Please arrive at [time] on [date] at [location] and ask for [designated staff member]. You can park at [location] and, if you don't have a vehicle, here is a schedule of public transportation that may be helpful [provide a link or include information in the package about public transportation]. Don't forget to bring [necessary documents] to complete the I-9 and W-4 forms. You can expect to dress [describe appropriate attire], and for lunch, we usually [describe typical lunch routine dining options].

The enclosed information is designed to serve as an introduction to [department name] and provide resources that will help you make a smooth transition into your new role.

The [department name] team is here to support your transition so, please know that you can call on any of us to assist you. We are looking forward to you joining our team and your success at Johns Hopkins.

Sincerely,

[Manager's/Supervisor's Name]

[Manager/Supervisor's Title]

*Adapted from Jean Barbazette, *Successful New Employee Orientation* published by Pfeiffer & Associates, copyright Jean Barbazette, 1994 www.thetrainingclinic.com