

LEADER'S ONBOARDING CHECKLIST

The onboarding process for new employees begins the moment they accept their offer. This checklist is designed to assist Hiring Leader's with the onboarding process, from preparation for the new employee's arrival to their successful integration into their department and the Faculty. You may wish to add additional activities and/or delegate tasks to another member of your team as appropriate.

Before Arrival

Outcomes: *A welcoming work environment with a fully equipped workspace, prepared to welcome new employee and affirm their decision that the FHS is a great place to work.*

- Notify HR of successful candidate; provide relevant information for offer (e.g., start date, starting salary, reporting details, position details, job description)
- Receive notification from HR regarding acceptance of offer and confirm time for new employee to meet with HR; you will be copied on all HR communications with your new employee regarding enrolment forms, MAC ID details, etc.
- Phone/email your new hire to officially welcome them to the FHS and answer any immediate questions they may have (once offer from HR accepted); clarify what time you expect him/her to arrive on their first day, location of department, parking, work attire, etc.; provide a contact number in the event any questions arise prior to first day, confirm any workplace accommodations required
- Set up workspace, equipment (computer, phone), office supplies, business cards, keys, security access (as applicable) and any required technology access (Mosaic, shared drives, printers, etc.)
- Ensure new hire is added to relevant email distribution lists or other internal communication tools; update Faculty/Staff directory with new employee's contact information, and update department website as applicable
- Assemble a department orientation package that includes job description, key contacts, organizational charts, strategic plans and priorities, specific policies and procedures that pertain to their role, and any other relevant information
- Prepare a schedule for the employee's first 1-2 weeks, including the new hire's first assignment

First Days

Outcomes: *Employee feels welcomed, comfortable, prepared and supported; begins to understand the position and performance expectations.*

- Clear your schedule for your employee's first day to greet them personally, and be available to check-in at the end of the day to answer any questions
- Send welcome email to team with short bio and what the new employee will be doing as part of your team; copy new hire
- Review department orientation package, providing an overview of the department mission, structure and priorities
- Provide orientation to role, review job description, duties and expectations, clarify schedule (including break times) and any required training, set some early goals
- Discuss procedures for scheduling time off, unexpected absences, what to do if they will be late, work schedule, hours, breaks, overtime, pay schedule, vacation, sick time, statutory holidays, etc.
- Provide computer and phone orientation, use of shared drives, voicemail, email (ensure able to activate McMaster email)
- Introduce to Mosaic and have a training plan in place if required for role
- Review information about what to do in case of emergency, identify any procedures unique to the employee's work location
- Introduce to colleagues, discuss the formal and informal culture, values and practices of the Faculty and department
- Give a tour of the employee's new environment including location of washrooms, kitchen and appliances (if applicable), copy/fax machine, emergency exits, office supplies, cafeteria, fire extinguishers, first aid kit
- Distribute assigned key to office
- Provide parking chit for first day to allow time to sort out parking
- Review the Health Sciences New Employee website with the employee and answer any questions the employee may have

- Provide time to attend HR Welcome Meeting to review and complete all necessary new hire documentation
- Assign a manageable assignment within the first week, be prepared to help the new hire sort priorities at first
- Make performance standards clear and let the associate know how his or her performance will be measured. Discuss any probationary review timing. Give feedback immediately on how he or she is doing
- Provide time to meet with FHS Ambassador

First Weeks

Outcomes: *New employee builds knowledge of internal processes and performance expectations; feels settled into the new work environment. Employee is cognizant of his/her performance relative to the position and expectations; continues to develop, learn about the organization, and build relationships. Ensure the employee feels part of the team and understands their role and expectations.*

- Recommend McMaster's *New Employee Orientation* program, and provide time for employee to attend
- Ensure employee completes required health & safety and AODA training (and any other required)
- Review incident/injury reporting, working alone policy, and SOPs related to department and role
- Offer an ergonomic assessment of work station, to be provided by FHS Safety Office
- Assist and provide any necessary training in Mosaic
- Review in detail responsibilities and expectations and explain how the role fits in the team and department
- Explain your own responsibilities and current priorities and how the employee's job supports them
- Review department guidelines and any applicable university policies impacting their work
- Set expectation for communication with the employee, will you have one on one meetings, how often will they occur, who will schedule them, do you have an open door policy, etc.
- Check in regularly with employee, answer questions, review expectations and set performance goals and priorities

First Months

Outcomes: *Employee is becoming fully aware of his/her role and responsibilities, beginning to work independently and produce meaningful work. He/she continues to feel acclimated to the environment both functionally and socially. Ensure the employee is engaged and a valued contributor in meeting organizational goals.*

- Complete 30-day check-in with new employee, in-person, relaxed environment (see Tools & Resources for sample)
- Schedule regular meetings to touch base, review and clarify performance objectives, expectations, project updates, and answer questions
- Continue to provide regular informal feedback on an ongoing basis
- Provide information about university events and activities related to the employee's interests
- Conduct interim/probationary review as appropriate
- Explain the performance review process and create written performance goals and professional development goals

First Year

Outcomes: *Employee is fully engaged in new role – applies skills and knowledge, makes sound decisions, contributes to team goals, understands how his/her assignments affect others in the organization, and develops effective working relationships. He/she has gained greater confidence in position, begins to take on additional assignments and works with some level of autonomy. Ensure the employee is motivated and performing at full working level, with full support of supervisor and team.*

- Continue to regularly review and clarify performance objectives and expectations, discuss project updates and answer questions
- Provide positive coaching, review issues or challenges, and provide regular, informal feedback
- Discuss career development and plans for the future