



New Employee Onboarding

MANAGER'S STEPS

BEFORE THE EMPLOYEE'S START DATE

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

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](#)) **Note:** Keys may now be requested as early as 24 hours after ITAC has processed a NetID. A completed Personnel Change Request (PCR) is no longer required for this step.
- ☐ 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

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

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

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

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]

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.