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](http://www.txstate.edu/gao/reporting/forms.html).

☐ 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](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](http://www.tr.txstate.edu/services/catalog/phone.html)

☐ Coordinate with [Access Services](http://www.txstate.edu/gao/reporting/forms.html) 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](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)
- 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:
  o Extent to which employee’s expectations of role and Texas State align with reality.
  o Extent employee’s skills and knowledge are being utilized and ways to better utilize them; what’s working, what they need more of, etc.
  o 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.