

**CALS Onboarding Process**

Onboarding Checklist

Onboarding is integrating and acculturating new hires into CALS and providing them with the tools, resources, and knowledge to be successful and productive. The onboarding process starts with the accepted job offer and continues through the end of the new hire’s first year.

For student and TE hires, a condensed onboarding process can be tailored as appropriate.

Updated: July 2019

Onboarding Checklist

**CALS Onboarding PROCESS**

**Goals of onboarding**

* Help the employee identify with the work unit, the department, CALS, and UW-Madison;
* Allow the employee to understand some of the organization’s values and priorities;
* Shorten new hire time to productivity and decrease the learning curve;
* Build a positive attitude about the unit, the department, CALS, and UW-Madison;
* Help the employee feel valued;
* Reduce new employee anxiety;
* Encourage socialization and a sense of belonging;
* Set performance expectations; and
* Understand how best to engage, manage, and motivate the new employee.

**onboarding Roles and responsibilities**

**Hiring Manager**

* + The most effective onboarding process is one that is led by the new hire’s direct manager/supervisor
	+ Responsible for meeting with the new hire to discuss performance expectations and ensure the new hire has the resources necessary to be successful
	+ Identify how to best engage, manage, and motivate the new hire
	+ A designee of the hiring supervisor may perform some of the duties

**Onboarding Coordinator**

* + Be accountable for the administrative tasks involved with an incoming new hire
	+ Serve as the primary contact once there is an accepted offer
	+ Monitor checklist progress during new hire’s onboarding process

**Peer Partner**

* + Serve as a resource and trusted advisor to the new hire
	+ Help introduce and explain the culture at CALS and UW-Madison
	+ Provide peer-to-peer advice, listen thoughtfully and provide -- when solicited -- critiques, suggestions, and feedback
	+ See the Peer Partner document for more details on responsibilities

**The UW-Madison *New Employee Onboarding* policy can be found here:** <https://kb.wisc.edu/ohr/policies/49579>

**If you have questions regarding the Onboarding Process, please contact the HR Manager assigned to your area. Name & email of HR Manager: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_.**

**Or you may contact the CALS Onboarding Coordinator: Vanessa Vosen;** **Vanessa.vosen@wisc.edu****, 608-890-0947.**

**\*Note: 2 weeks advance notice is requested to ensure parking, phone, and computer technology is set up prior to the new hire’s first day.**

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| 1. **Pre-boarding – Prior to the First Day**
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| **Hiring Manager** (or designee)**Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*** *After selection is made, Onboarding Coordinator will schedule a meeting with Hiring Manager to:*
* Identify Peer Partner
* Review timeline and onboarding process
* ***At least 1 week prior to start date***
	+ Prepare office access and equipment
	+ Request to obtain and set up computer
	+ Printer/printer access
	+ Phone line/number
	+ Office/building keys or access
	+ Prepare office space and supplies
	+ Clean work area
	+ Provision with basic supplies
	+ Order nameplate for office (if applicable)
	+ Meet with Peer Partner
	+ Identify training opportunities (including PSM series for new supervisors)
	+ Coordinate first-week schedule:
		- Work with Onboarding Coordinator to arrange schedule
		- Schedule team meeting for new hire to meet with co-workers
		- Identify other people the new hire should meet and schedule appropriate meetings
 | **Onboarding Coordinator****NAME: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*** *After selection is made,* Onboarding Coordinator will schedule a meeting with Hiring Manager to:
	+ Identify Peer Partner
	+ Review timeline and onboarding process
* ***Upon verbal acceptance of position***
* Contact (email) new hire to introduce onboarding contact (Note: see template)
* Send Peer Partner the Expectation Document
* ***1 week prior to start date***
* Strongly recommend that new employee sign up for Benefits 101: <https://www.talent.wisc.edu/OHRDCatalogPortal/Default.aspx?tabid=29&CourseGroupKey=16792>
	+ Send welcome letter/email (Note: see template):
	+ Reporting location and time
	+ Parking arrangements
	+ Dress code
	+ Benefits overview
* Announce the new hire and his/her arrival to faculty and staff in the department/unit (e.g. bio/background, arrival date)

* Schedule campus new employee

orientation session (if new to UW) - <https://www.talent.wisc.edu/OHRDCatalogPortal/default.aspx?serieskey=294>* Call WisCard Office at Union South to make sure new employee is in the system – 262-3258
* Confirm new employee home and work contact info
 | **Peer Partner NAME: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_*** *Peer Partner will be identified and chosen by the Hiring Manager and the Onboarding Coordinator:*
* ***1 week prior to start date***
* Introduce self to new hire
* Meet with Hiring Manager and/or Onboarding Coordinator
* Review Peer Partner Expectations Document
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| 1. **First Impressions — Day 1**
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| **Hiring Manager** (or designee)* Welcome new hire on arrival
* Provide brief introductions to key staff
* Ensure new hire has a lunch date/plans or knows the geographical area
* Computer logon (password) and email setup (provide remote access instructions)
* Describe procedures for calendaring and communication (e.g. Outlook)
* Facilitate connection between Peer Partner and new hire
 | **Onboarding Coordinator**Ensure the following occurs: * Provide keys for office, building, etc.
* Instruct on how to enroll in: UW-Madison Campus New Employee Orientation and Benefits 101
* Discuss Peer Partner role and who is assigned to new hire
* Explain transportation/parking application process
* Update directories/websites to add new employee
* Consult with benefits and payroll specialist to review relevant payroll and benefits forms
* Direct to Union South to obtain WisCard
* Obtain signed Appt letter (send to CALS HR)
* Telephone/Voicemail set up
 | **Peer partner*** Meet with the new hire to explain why you are part of their onboarding process
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| 1. **First Impressions — Week 1**
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| **Hiring Manager** (or designee)* **Provide orientation of work unit**
* Introduction of co-workers
* Where the employee sits, where co-workers sit
* How all the jobs in the work unit fit together
* How the job fits within the department
* How the department fits within the university
* Mission statement of work unit
* Staff meetings
* Day at a glance (describe a typical work day)
* **Performance expectations**
* Articulate expectations
* Review position description
* Explain performance evaluation process
* Schedule follow-up meetings with new hire
* **Operations**
* Work hours / lunch / breaks
* Leave time procedures
* Probationary evaluation period
* HRS time entry or monthly leave reports
* Work unit procedures
* Business card (if applicable)
 | **Onboarding Coordinator*** Ensure employee completes I-9
* Orientation to Department
* Introduce Department procedures, handbook, resources
* Provide campus resources to new hire, including:
* Link to campus map: [www.map.wisc.edu](http://www.map.wisc.edu)
* Information on the free campus bus 80: [www.cityofmadison.com/Metro/schedules/Route80/](http://www.cityofmadison.com/Metro/schedules/Route80/)
* Directions to sign up for WiscAlerts: <https://uwpd.wisc.edu/services/wiscalerts/>
* Explain the occupant emergency plan for the new employee’s work place
 | **Peer partner*** Meet with new hire to answer questions, discuss unit’s culture and operations
* Interact with new hire regularly and be available to answer questions about culture, business processes, etc.
* Please see the Peer Partner Expectations Document for information on what you should be discussing with the new hire at this point in time
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| 1. **Getting Acquainted – First 30 days**
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| **Hiring Manager** (or designee)* Develop relationship through frequent, informal conversations
* Identify and provide resources needed to succeed
* Review performance expectations, competencies, and performance management process
* Go over work unit practices and procedures
* Describe professional development plans / opportunities, including networking opportunities
 | **Onboarding Coordinator*** Ensure that benefits forms have been completed before end of 30 days
* Ensure that items on Onboarding Checklist have been occurring
 | **Peer Partner*** Continue serving as resource to new hire
* Discuss training and ask if the employee is getting what they need
* Please see the Peer Partner Expectations Document for information on what you should be discussing with the new hire at this point in time
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| 1. **Settling In – First 90 days**
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| **Hiring Manager** (or designee)* Conduct formal mid-point probationary performance review (if 6-month probation)
* Provide feedback on performance with recognition/praise as appropriate
* Continue to schedule meetings with key people or groups to learn about priorities
* Identify training opportunities consistent with specific organizational values, initiatives, culture
* Discuss new hire’s organizational fit and comfort level with the department
* Verify that employee has the resources to perform the job
 | **Onboarding Coordinator*** Ensure that items on Onboarding Checklist have been occurring
 | **Peer Partner*** Please see the Peer Partner Expectations Document for information on what you should be discussing with the new hire at this point in time
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| 1. **Becoming Adjusted – Within 6 months**
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| **Hiring Manager*** Conduct final formal probationary performance evaluation (if 6-month probationary period) or formal mid-point probationary performance review (if 12-month probationary period)
* Continue to develop relationship with employee
 | **Onboarding Coordinator*** Ensure that items on Onboarding Checklist have been occurring
 | **Peer Partner*** Discuss if there are individuals that the new hire would like to meet that make sense in their role or function at the University
* Encourage the employee to get involved in activities on campus and/or in the unit
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| 1. **Fully Engaged – At the One Year mark**
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| **Hiring Manager*** Conduct final formal probationary performance evaluation (if 12-month probationary period)
* Set performance expectations for next year
* Identify opportunities for professional development
 | **Onboarding Coordinator*** Evaluate onboarding process with Hiring Manager and Employee
 | **Peer Partner*** Discuss the last year’s onboarding experience and any feedback that the individual could give to make the program better
* Encourage the employee to get involved in activities on campus and/or in the unit
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