SUPERVISOR ONBOARDING TOOLKIT

OFFICE OF BUSINESS & FINANCE
Dear Supervisor,

Congratulations on your new hire! We look forward to guiding you through the process of bringing your new employee on board.

This supervisor onboarding toolkit will provide the materials and information you’ll need to be successful. We know all of the information provided to you and your new employee can be overwhelming, so this will be a document you can look back on during the first 90 days and beyond. Please also use our onboarding website as needed.

Your HR representative in Human Resources (HR) is available to assist you with anything else you need while onboarding your new employee.

Happy Onboarding,
Office of Business & Finance

WHAT IS ONBOARDING?

Onboarding brings your newly hired talent up to speed with policies, processes, culture, expectations, and the day-to-day responsibilities of your department. It also ensures a new employee feels welcome, engaged, inspired, and should confirm their choice to join your department and Western Michigan University (WMU).

WHY IS ONBOARDING IMPORTANT?

Onboarding helps you and the University achieve the following objectives:

- Builds WMU’s and the Office of Business & Finance’s (OBF) reputation for being a great employer, including great training, clear leadership and a strong organization
- Helps retain staff members
- Reduces high turnover costs
- Increases staff engagement and productivity
- Builds a cohesive team and fosters collaboration
Onboarding Checklist for Supervisor [3]
A checklist for you to complete during your employee's first six months.

Onboarding Checklist for New Employees [5]
A checklist for your new employee to complete during the first six months.

New Employee Success Profile [7]
Use this profile to identify and share your expectations and vision of success. Sharing this tool with your new employee communicates that their success is important to the University.

Check-In Meeting Questions [9]
These sample questions will give you a good starting point for checking in with your new employee regularly.

Additional Materials for Reference

- **Onboarding Webpage**
  A webpage dedicated to all resources needed for the onboarding process and beyond.

- **Onboarding Plan Template**
  Excel template to set and work through job-specific goals between you as a supervisor and your employee. The tool can be expanded or adapted for any timeline. It can be found on the [OBF Onboarding webpage](#).

- **Onboarding Overview**
  A visual overview to help you understand the full onboarding process and involved parties. It can be found on the [OBF Onboarding webpage](#).

Addendum
Departmental-specific materials should be added by your unit.
ONBOARDING CHECKLIST FOR SUPERVISOR

This checklist was created for the Office of Business and Finance and is for your reference. Not all activities will be relevant for each employee.

BEFORE THEIR FIRST DAY
- Send an informational letter outlining the specifics of the employee’s position, including department organization chart to show reporting relationship, salary, etc.
- Review email from HR, including Supervisor’s Checklist for the New Employee
- Be familiar with what paperwork a new hire needs to complete
- Confirm date and time of HR New Employee Orientation session
- Confirm employee was able to access their email account
- Before the start date, send your new employee an email that includes the following:
  - Date and time to arrive on the first day
  - What to bring on the first day
  - Where to report and whom to ask for upon arrival
  - Transportation and/or parking information
  - Dress policy
  - Options for lunch
- Send an announcement to your department about the new team member and a brief overview of their work experience – encourage staff to send welcome emails
- Prepare work space for employee
  - Have office space cleaned, if needed
  - Set up the phone(s): Determine if your new employee will need a new phone, or have an existing one reconfigured
  - Ensure office supplies are available (pens, paper, post-its, message pads, etc.)
  - Include a welcome sign on the door or computer, if possible
- Add employee to appropriate email lists and calendar systems
- Coordinate with Office of Business and Finance Information Technology (OBFIT) or Facilities Management Information Technology (FMIT) for computer and other technology needs
- Work with building coordinator to provide building access
- Prepare job duties/expectations document (Onboarding Plan Template)
- Select one of your staff members to be a new hire ambassador for your new hire’s first few months
- Set up meetings (one-on-one/small group) with individuals that your new employee should meet – team members can describe their work and how it integrates with the work of the new team member
- Schedule one-on-one meetings with your new employee to discuss the job description, performance expectations, appropriate attire, time and leave, etc.
- Create a first-week schedule for new employees (meetings with others, downtime to review orientation materials, tour of building, etc.)
FIRST DAY
- Department tour – workspace, break room, supply space, bathrooms, etc.
- Introduce new employee to colleagues
- Discuss emergency building plans
- Discuss time reporting procedures (time sheet, sick or vacation leave, etc.)
- Review department policies and any compliance forms (office hours, dress code, etc.)
- Issue keys, if applicable
- Discuss probationary period
- Approve system access requests
- If employee is assigned a vehicle, discuss necessary training and responsibilities
- Schedule designated time for the new employee to review, complete and sign necessary paperwork, if needed (I-9 Form, benefit enrollment, etc.)
- Introduce them to their onboarding ambassador

FIRST WEEK
- Discuss department mission, goals, and values
- Review job duties/expectations document (Onboarding Plan Template)
- Discuss assessment criteria and timeline for performance evaluation
- Discuss workplace trainings and how those will be administered (online/in person)
- Discuss relevant recurring meetings
- Review customer service expectations
- Assist with questions regarding employee handbook and onboarding webpage
- Distribute/review department and University contact lists and organizational charts
- Add the new employee to your website directory page
- Order name tag and business cards, if applicable

ONE MONTH
- Continue to review job duties/expectations document (Onboarding Plan Template)
- Plan performance management timeline moving forward

TWO MONTHS
- Complete two-month evaluation for staff compensation system (SCS) employees
- Continue to review job duties/expectations document (Onboarding Plan Template)

THREE MONTHS
- Continue to review job duties/expectations document (Onboarding Plan Template)

FOUR MONTHS
- Complete four-month evaluation for SCS employees

SIX MONTHS
- Complete six-month review for SCS employees
ONBOARDING CHECKLIST FOR EMPLOYEE

This checklist was developed by the Office of the Vice President for Business and Finance and is for reference. Not all activities will be relevant for each employee.

BEFORE YOUR FIRST DAY
- Sign and return offer letter and any other applicable HR forms
- Complete Form I-9
- Confirm HR New Employee Orientation date and time with supervisor
- Review campus map for building and parking information
- Review campus busing schedule, if needed
- Check on your email account and set up password (OIT Help Desk: 269-387-4357)
- Set up Virtual Private Network (VPN) and 2 Factor Authentication (2FA)
- Obtain virtual parking permit and add vehicle(s) by following the Parking Pass Step by Step Guide
- Obtain Bronco ID card
- Review benefits information

FIRST DAY
- Attend HR New Employee Orientation
- Meet with your supervisor
- Meet your colleagues and tour the department – workspace, break room, supply space, bathrooms, etc.
- Discuss emergency building plans
- Review time reporting procedures (timesheet, sick or vacation leave, etc.)
- Review department policies and sign compliance forms (office hours, dress code, etc.)
- Sign for and receive keys, if applicable
- Request system access through GoWMU
- Set up voicemail – Phone User Guide
- View Business and Finance Welcome Video
- Meet your onboarding ambassador

FIRST WEEK
- Discuss department mission, goals, and values
- Review job duties/expectations document Onboarding Plan Template
- Discuss assessment criteria and timeline for performance evaluation
- Discuss workplace trainings and how those will be administered (online/in person)
- Discuss relevant recurring meetings
- Review customer service expectations
- Review Employee Handbook
- Review Office of Business and Finance Onboarding Webpage
- Review Business and Finance Information Technology Website
Review Information Technology’s website
Review department website
Complete CMS training and review roles and guidelines, if applicable: CMS User Guide
Sign up for a Campus Tour

ONE MONTH
Complete all benefits enrollment
Review Accounting Services training videos, if applicable
Review HR training resources
Review Bronco Fix-it/FM Service Center website
Continue to review job duties/expectations document with supervisor Onboarding Plan Template
Establish the timeline for continued performance reviews

TWO MONTHS
Complete two-month evaluation with supervisor, for staff compensation system (SCS) employees
Continue to review job duties/expectations document with supervisor Onboarding Plan Template

THREE MONTHS
Continue to review job duties/expectations document with supervisor Onboarding Plan Template

FOUR MONTHS
Complete four-month evaluation with supervisor, for SCS employees

SIX MONTHS
Complete six-month review with supervisor, for SCS employees

TOOLBOX ADDITIONS A-Z
- A-Z Directory
- Athletics
- Building Coordinator List
- Campus Dining
- Campus/Parking Maps
- Design Services - Furniture and Signage
- Environmental Health and Safety
  - Accident Injury form
  - Ergonomic Workspace Guidance
- Logistical Services
  - Mail Services
  - Surplus Sales
- Miller Auditorium
- Meet the President's Cabinet
- Recycling for Faculty and Staff
- Technology Help Desk
- Tuition Discount and Remission
- Writing Style Guide
- Western Wellness
  - Student Recreation Center
  - West Hills Athletic Club
  - Sindecuse Health Center
- WMU Closure Policy
- WMU Public Safety
  - Walking Escorts
  - Lost and Found
  - Bicycle Registration
  - Parking Information
  - Bronco Card
NEW EMPLOYEE SUCCESS PROFILE

Name ___________________________              Today’s Date ____________________

Position ___________________________              Start Date _____________________

What are the four competencies to focus on in the first 90 days? (use additional pages if there are more than four)

1. ____________________________________________________________________________

2. ____________________________________________________________________________

3. ____________________________________________________________________________

4. ____________________________________________________________________________

ONE MONTH

Success looks like (what will the employee have learned or done?):

I or others will help our new employee achieve success by:

TWO MONTHS

Success looks like (what will the employee have learned or done?):

I or others will help our new employee achieve success by:
THREE MONTHS

Success looks like (what will the employee have learned or done?):

I or others will help our new employee achieve success by:

ADDITIONAL GOALS AND TRAINING

Goals for the new employee include:

I or others will help our new employee achieve success with these goals by:

Specific training needs or action plans to achieve the goals are:

Source: Adapted from University of Washington Human Resources, Onboarding Toolkit. Retrieved from https://hr.uw.edu/talent/onboarding/new-employee-onboarding/
CHECK-IN MEETING QUESTIONS

Name ___________________________              Today’s Date ______________________

Position ___________________________              Start Date ______________________

Is this role what you thought it would be?
_____________________________________________________________________________________
_____________________________________________________________________________________
_____________________________________________________________________________________

What surprised you during your first few months on the job?
_____________________________________________________________________________________
_____________________________________________________________________________________
_____________________________________________________________________________________

How do you see your job relating to the University mission?
_____________________________________________________________________________________
_____________________________________________________________________________________
_____________________________________________________________________________________

Has the onboarding process been helpful?
_____________________________________________________________________________________
_____________________________________________________________________________________
What improvements would you like to see in our onboarding process?

_____________________________________________________________________________________
_____________________________________________________________________________________

Was your in-person/online Human Resources New Employee Orientation helpful? Do you have any questions regarding your benefits? (if so, assist in scheduling with HR)

_____________________________________________________________________________________
_____________________________________________________________________________________

Do you have all the work tools you need?

_____________________________________________________________________________________
_____________________________________________________________________________________

Do you have enough, too much, or too little time to do your work?

_____________________________________________________________________________________
_____________________________________________________________________________________

Have you been welcomed by your co-workers?

_____________________________________________________________________________________
_____________________________________________________________________________________
When you have questions at work, who do you talk to? Do you feel comfortable asking questions?

_____________________________________________________________________________________
_____________________________________________________________________________________

Do you believe your ideas are valued? Can you give examples?

_____________________________________________________________________________________
_____________________________________________________________________________________

Is there something we should be providing that we are not?

_____________________________________________________________________________________
_____________________________________________________________________________________

Is there anything you still need access to?

_____________________________________________________________________________________
_____________________________________________________________________________________

Is there anything you feel “out-of-the-loop” about?

_____________________________________________________________________________________
_____________________________________________________________________________________

How can I help you succeed?

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

_____________________________________________________________________________________

_____________________________________________________________________________________