

# SUPERVISOR ONBOARDING TOOLKIT

OFFICE OF BUSINESS & FINANCE



# WELCOME TO WESTERN MICHIGAN UNIVERSITY

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

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A checklist for you to complete during your employee's first six months.

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A checklist for your new employee to complete during the first six months.

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

# 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?

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

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

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Has the onboarding process been helpful?

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What improvements would you like to see in our onboarding process?

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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)

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Do you have all the work tools you need?

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

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Have you been welcomed by your co-workers?

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

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

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

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Is there anything you still need access to?

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

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How can I help you succeed?

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

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**Source:** Adapted from University of Washington Human Resources, Onboarding Toolkit. Retrieved from <https://hr.uw.edu/talent/onboarding/new-employee-onboarding/>.