
Onboarding Toolkit

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Onboarding – Prior to the First Day

Onboarding is critical to your new employee's engagement and retention. Onboarding programs can have a dramatic and measurable impact on your new employee's productivity, retention, customer service quality, workplace safety and future hiring success. Empowering new employees early gives them the confidence and tools they need to be successful.

Communication:

- If there is a period of time between your offer date and your new hire's start date, it is important to stay in regular contact/communication with your candidate via telephone and/or email; remind them to complete their new hire paperwork PRIOR to their first day; reiterate your enthusiasm for their choosing Western as their employer
- Send an email to your team introducing your new hire which includes a brief summary of their background and their start date
- Call your new hire with their W#, and tell them where they can purchase a parking/bus pass

Logistics:

- Check the PageUp system to see if your new hire has completed their paperwork
- Check if your new employee has system access; contact ATUS if there are questions (x3333)
- Assign keys if necessary; contact the Lockshop with questions (x3687 – Lockshop@wwu.edu)
- Request alarm codes, if necessary; contact the Lockshop with questions (x3687)
- Order business cards, if necessary; business cards are ordered through Copy Services (x7316)
- Update your group email distribution lists; ensure new hire is invited to previously scheduled meetings
- Update departmental website with employee's name/picture, if applicable
- Set up departmental specific training/system permissions (P:/ drive, outlook folders) Set up their mailbox, if necessary
- Request a P-card (purchase card), if required. Contact Brenda Ancheta, x3561 (Brenda.Ancheta@wwu.edu) if you have any questions
- If your employee will be approving payroll, make sure they have the necessary permissions
- If your hire was a student, contact ATUS (x3333) to ensure email address is changed over to staff

Welcoming:

- Prepare the new office/work space. Ensure the space has what it needs – furniture, lighting, pens/pencils, paper, etc.
- Set up any appointments with individuals your new hire will need to meet
- Create a first week schedule for employee, if necessary. This should include time to read orientation materials/manuals, etc. as well as a lunch with you and the team.

Mentorship

Have you thought about teaming your new employee with a mentor? Mentors are other employees who can help your new employee navigate their new position/role/campus. Having a mentor for your new hire will help familiarize them to the Western community, and also develop a professional connection to another employee in a similar role.

Who Can Be A Mentor. A mentor should be motivated by their desire to watch new employees achieve their true potential. A mentor is someone who is available to answer questions and help the employee learn job responsibilities, all while providing leadership development for them mentor. The mentor must be willing to make a small time commitment to your new employee. The mentor can be someone already in your department (or division) who holds a similar role to your new employee.

What's In It For the Mentor. Mentorship has a positive impact on the mentor – as they are now seen as a leader, have the ability to gain insight from newer employees, and develop new relationships which adds to their engagement and commitment to Western. If you are going to utilize a mentor, plan to offer some recognition for those who take on this essential and valuable task.

Setting Goals and Expectations. You will need to discuss with your chosen mentor to determine where/when/how meetings will take place, and the expectations of what you would like your new employee to gain from the relationship. This can be a short-term, information situation, or more formal long-term assignment; it is up to you. If due to location or other circumstances, you can set up e-mentoring. E-mentoring occurs when the relationship is developed through email and telephone.

Onboarding – First Day

- Terms of employment (probationary period, if applicable, salary)
- Job duties and performance expectations
- Work schedules (breaks, lunch)
- Call-out procedure (who should they call if they are going to be late/sick,etc.)
- Timesheets (how to log on to Web4U and complete and deadlines)
- Pay dates (where to pick up their paycheck, if applicable)
- How to request time off (departmental procedures, any black out times?)
- Department organizational chart and University organizational chart
- Department safety plan
- Equipment use and location
- Location of restrooms, break room and food services
- Building use and security (provide alarm code, if appropriate)
- Essential policies and procedures pertinent to their position
- W# and computer login information (this information was emailed to the contact listed on the Personnel Action form; if you have questions, please contact ATUS, x4444)
- Dress Code

Onboarding – First Week

- Ensure your new hire is signed up for New Employee Orientation
- Meet and greet with other members of your department
- Take them on a campus tour
 - Show them the various dining locations
 - Bookstore
- Accompany your hire to the Western Card Office (Edens Hall 108) to get their Western ID card
- Explain ‘Western Wednesday’ and how your office celebrates
- Sign your employee up for Sexual Harassment Prevention Training (contact Equal Opportunity Office at 650-3307)
- Have lunch with your new hire
- Provide a list of department/university acronyms
- Walk through the University website
 - Where are pertinent forms located?
 - How to navigate.
 - Departmental website
- Conduct an “end of first week” discussion
 - Any outstanding questions/needs?

Onboarding – Continued Communication

During your employee's first 90 days, you will want to work with them to ensure they understand the following key items:

- How is my department organized?
- What are the goals and mission?
- What is the procedure for requesting time off?
- What are my duties and responsibilities?
- When are department meetings held?
- Supervisor attendance/tardiness expectations
- What development opportunities are available to me?
- What are my colleagues functions?
- Who do I call for...?
- How do I order supplies or other tools/resources?
- What are the safety requirements?