**Onboarding Planning Tool**

| **WHO/WHEN** | **Prepare** | **Welcome/Orient** | **Connect/Integrate** |
| --- | --- | --- | --- |
| **Upon hire decision** | **IT set up** | **Close to start date** | **First day(s)** | **First week(s)** | **First month(s)** | **Months 3-6** | **Months 7-12** |
| Local HR Contact | * Finalize start date *[[1]](#endnote-1)*
* Submit hiring paperwork and enter in Bridge
* Confirm onboarding roles & responsibilities
* Confirm employee’s receipt of New Hire Letter
* Email New Hire Letter to manager
* Email employee with additional local instructions [[2]](#endnote-2)
 | * Set up email, KY #
 | * Communicate first day logistics*[[3]](#endnote-3)*
* Communicate social/practical norms & info*[[4]](#endnote-4)*
 | * Assist with completing any outstanding New Hire Activities
 | * Check in with employee
* Check in with manager
 | * Confirm understanding of key department policies & procedures
* Invite to welcome breakfast
 | * Perform 4-month interview [[5]](#endnote-5)
* Send 5-month notice
 |  |
| Office Administrator | * Request technology equipment [[6]](#endnote-6)
* Create personnel file
* Order personalized supplies[[7]](#endnote-7)
* Identify office location
* Identify orientation buddy
 | * Update department documents and databases [[8]](#endnote-8)
* Arrange parking, if needed
* Request phone set up
 |  |  |  |  |  |  |
| Manager | * Identify peer buddy [[9]](#endnote-9)
* Block off time for employee on calendar
 | * Add to standing meetings
* Request authorizations [[10]](#endnote-10)
 | * Orient peer buddy
* Announce hire to department/team/area [[11]](#endnote-11)
* Place welcome call to employee
* Create schedule for first few weeks *[[12]](#endnote-12)*
 | * Orient to role, responsibilities & expectations [[13]](#endnote-13)
 | * Identify & address learning needs *[[14]](#endnote-14)*
* Discuss communication *[[15]](#endnote-15)*
* Give overview of department/ area *[[16]](#endnote-16)*
 | * Orient to LHD as an Institution [[17]](#endnote-17)
* Discuss & set goals [[18]](#endnote-18)
* Perform 3-month check in
* Introduce to clients/colleagues from other LHDs/sites [[19]](#endnote-19)
 | * Perform 6-month review [[20]](#endnote-20)
 | * Perform 1-year review
 |
| Orientation Buddy |  |  | * Block off time to spend with employee
* Prepare welcome packet *[[21]](#endnote-21)*
* Prepare office *[[22]](#endnote-22)*
 | * Give tour of local work environment(s) [[23]](#endnote-23)
* Introduce employee to local co-workers
 | * Orient to local IT systems [[24]](#endnote-24)
* Explain local administrative & financial procedures [[25]](#endnote-25)
* Orient to LHD online resources [[26]](#endnote-26)
 | * Share perks and benefits of LHD employment [[27]](#endnote-27)
 |  |  |
| Peer Buddy |  |  |  | * Introduce self
 | * Arrange to have lunch with new employee
 |  |  |  |
| Local IT provider |  | * Configure/set up equipment
 |  | * Assist with phone and technology equipment set-up and basic use *[[28]](#endnote-28)*
 |  |  |  |  |

1. When determining a start date, make sure the manager will be available to spend time with the new hire, and that there will be sufficient time to prepare for him/her [↑](#endnote-ref-1)
2. Could include electronic version of the HR New Hire Letter, hiring forms, pre-hire checklists [↑](#endnote-ref-2)
3. Confirm start date & time, and where they should go first; parking; what to bring/prepare (e.g. I-9 documentation); basic schedule for the day [↑](#endnote-ref-3)
4. This could include info about kitchen facilities and lunch options; info about office space; guidelines on clothing (what to wear/bring, esp. if climate control is an issue) [↑](#endnote-ref-4)
5. Might want to review this grid to identify any incomplete items [↑](#endnote-ref-5)
6. Includes hardware (laptop, tablet, phone); software [↑](#endnote-ref-6)
7. Personalized supplies might include: Business cards, name plate, nametag, badge, uniform [↑](#endnote-ref-7)
8. These might include org charts, local staff directories/databases/websites, online department directory, floor plans [↑](#endnote-ref-8)
9. See Buddy Guidelines [↑](#endnote-ref-9)
10. Authorizations might include access to department servers, printers, intranets, databases, buildings, copiers, etc. Add to mailing lists; add authorizations in Roles database; request travel card [↑](#endnote-ref-10)
11. Announcements should include start date, employee’s role, and a short bio. Copy the new employee, if appropriate. [↑](#endnote-ref-11)
12. Identify standing meetings to attend, people to meet with in first weeks; could include welcome breakfast or other local new hire event; 1:1 meetings with area directors, peers, direct reports, clients, colleagues; HR New Hire Orientation and other trainings; etc. [↑](#endnote-ref-12)
13. Discuss job description; performance review process; set expectations for the first several months, including getting/giving feedback [↑](#endnote-ref-13)
14. Could be standard software (e.g. Microsoft Office); equipment; LHD-specific tools or procedures; business skills; reference materials. Training options include 1:1 training by a colleague, open enrollment courses, reading/self-study, etc. [↑](#endnote-ref-14)
15. Include how, when, how often to communicate; specific meeting schedule (both regular meetings and specific onboarding check-ins for assessment/feedback) [↑](#endnote-ref-15)
16. Overview might include org structure, subgroups, teams, methods of communication (internal and external), mission, vision, values, culture; include how role interacts with other teams [↑](#endnote-ref-16)
17. Orientation to LHD’s mission, vision, structure, culture. Partially done at New Hire Orientation, could be done through a specific project or assignment. [↑](#endnote-ref-17)
18. Include short, medium and long-term goals; Incorporate employee's unique skills, interests & expectations [↑](#endnote-ref-18)
19. Could include attending meetings, visiting sites, shadowing; Explain/demonstrate how role/department intersects with other areas at LHD; goal is for the employee to have professional relationships within each group [↑](#endnote-ref-19)
20. Re-visit job description, goals and expectations; discuss additional training, development, and networking needs [↑](#endnote-ref-20)
21. Welcome Packet might include: job description, welcome note from manager, schedule for first few weeks, contact names and phone lists (including who to go to for what), important websites, access codes, instructions for using phone & computers systems, mission and values of the Institute, information on your area, etc. [↑](#endnote-ref-21)
22. Preparing the office might include: Cleaning the work area; setting up cube/office space with supplies, including keys, business cards, name plate; assigning a mailbox; adding name to attendance boards [↑](#endnote-ref-22)
23. Tour might include where to find bathrooms, supplies, equipment, mailboxes (incoming & outgoing), kitchen equipment, copiers, printers, stairs, elevators, entrances, emergency exits, etc. Also building hours, access codes; where to hang coats; how to adjust temperature [↑](#endnote-ref-23)
24. Local IT orientation might include websites, intranet, standard programs, folder structure, security protocols [↑](#endnote-ref-24)
25. Administrative and financial procedures might include: Time off requests; time sheets; vacation tracking; emergency closings; fire/emergency protocol; IT security; ordering materials, books, memberships; travel requests; training; reimbursement procedures; etc. (ideally also let them know where to find this info in writing) [↑](#endnote-ref-25)
26. For example, person & directory searches, events calendar [↑](#endnote-ref-26)
27. Perks & benefits are partially covered at New Hire Orientation, but could be supplemented with Onboarding and/or conversations tailored to the person's unique needs & interests [↑](#endnote-ref-27)
28. Could include certificates, Outlook account, shortcuts, signatures, standard templates [↑](#endnote-ref-28)