Orientation Toolkit:

How to Successfully Onboard Your New Employee

**Human Resources,
Organizational Development and Learning**

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Orientation Toolkit for Managers

As a manager, you play a critical role throughout the life cycle of your employee and especially during an employee's first few days on the job, helping to ensure they are assimilating well into the team. It's an exciting, rewarding, and challenging time for the new employee. Your active and positive involvement to ensure a successful transition into the role will help set the stage for building the employee/manager relationship and create a positive experience for your new employee. Additional benefits of an effective onboarding program, to you and Queen's, can include lower turnover costs, fewer errors and increased productivity in a shorter time frame.

Onboarding begins as soon as an offer of employment is made and ends with completion of the probationary period. It is a process to make the new employee feel welcomed and valued. It helps the employee confirm their own decision to join the organization. It helps them become a contributing member of the team.

This Orientation Toolkit for Managers will provide you with the tools, resources, and consistency of approach to help you prepare for your employee's first days, weeks and year on your team.

Should you need additional support, or if you have any questions or concerns, please contact your HR Advisor.

The tools you will find in this Toolkit include:

For Managers:
- ❑ Before Day One communication plan
- ❑ Checklist with a timeline of manager responsibilities
- ❑ Links to key forms, information and sample plans (included in the checklist)
- ❑ Talking points for:
  - ❑ First discussion
  - ❑ Six-month check-in
  - ❑ One-year performance review
- ❑ Check-in questions (to be used at any time)
- ❑ Template for welcome email to send to the team

For the Buddy or Sponsor:
- ❑ Orientation Toolkit for Assigned Buddy or Sponsor

For the New Employee:
- ❑ Orientation Toolkit for the New Employee
- ❑ New employee reference guide

Before Day One Communication Plan

There is a critical need to communicate with new employees between the time they accept the offer and their first day on the job. This communication helps to provide information, answer questions, reduce anxiety and permit a smoother transition as the new employee comes aboard. Communication should be structured and occur at specific times during the orientation process. The table below summarizes recommended timing, who initiates the communication, content considerations, and channels of communication.

Timing	Initiator	Content	Communication Channels
After employment offer is accepted	Hiring Manager	- Welcome template letter - Explain upcoming new employee process (e.g. complete the HR Biographical data sheet, obtaining your net ID and entering banking information in MyHR) and set expectations - Provide basic information for first day including morning in Human Resources (e.g. parking, appropriate dress attire, work location, start time, places to eat lunch) - Information on buddy or work sponsor - Answer any questions	Phone call with follow-up email (be sure to copy buddy or colleague on email)
2-3 days before first day	New employee buddy or work sponsor	- Introduce yourself, your role and that you are his/her buddy or work sponsor - Describe lunch plans and meeting location - Provide contact information - Answer questions	Email or phone call

More information can be found in these sections:

- Manager Talking Points

- Sample welcome email to the team

- Orientation Toolkit for Assigned Buddy or Sponsor

New Employee Orientation Checklist

NEW EMPLOYEE INFORMATION

Name:	Start Date:
Position:	Manager:
Office/Building:	Phone Number:

	Task	Status
BEFORE FIRST DAY	Send welcome package with important information and welcome letter (via email)	❑
	Assign and prepare workspace and provide basic office supplies	❑
	Obtain the new employee's ID number prior to their first day. Send the employee the Welcome letter. This template letter provides new employees with information about the required activities that need to be completed as they begin employment including the steps required to activate their NetID, access the MyHR portal and enter their banking and personal information. Additional information on MyHR is available online: http://www.queensu.ca/humanresources/employee-tools/myhr-self-service Please note that in order to obtain the employee ID, the HR Biographical Data sheet must be first be processed into HR PeopleSoft.	❑
	Arrange for a telephone, or manage a password, and obtain accessing instructions and codes	❑
	Arrange for office and desk keys, fob and/or security pass	❑
	Assign a "buddy" to assist the new employee as a "go-to" person (see Toolkit for Buddy or Sponsor)	❑
	Send an email to the department announcing the new employee (see Sample email)	❑
	Arrange your schedule to be able to meet your new employee at noon in Human Resources	❑
	Develop a training plan and schedule as needed	❑
	Develop a work plan for the first afternoon and first few weeks	❑
FIRST AFTERNOON/ORIENTATION	Welcome the new employee and show them their space	❑
	Share the New Employee Reference Guide	❑
	Review confidentiality of information, procedure guidelines, alarm procedures, and the guide to responding to emergencies	❑
	Review and complete the Safety Orientation checklist and retain in the Department as evidence of compliance with the requirements of the Occupational Health and Safety Act. Find the checklist at this link: http://www.safety.queensu.ca/sites/webpublish.queensu.ca.ehswww/files/files/Biosafety/orientation_checklist.pdf	❑
	Review hours of work, schedule, pay schedule, overtime policy, and vacation planning	❑
	Discuss procedures for scheduling time off and unexpected absences	❑
	Review proper attire for workplace or lab	❑
	Review departmental policies for cell phone, personal calls and other departmental policies	❑
	Review departmental and role security requirements	❑
	Provide the employee with keys, fob, security pass	❑
	Tour of the department and/or building (washrooms, lunchroom/coffee machine, vending machines, water fountain, closets, emergency exit, first aid kit)	❑
	Provide a copy of seating charts if available or organizational chart	❑
	Confirm employee is aware of the Onboarding process	❑
	Location of printer, fax, copier, shredder, office supplies (and information on how to order)	❑
	Computer orientation, including log-in, passwords, networks, email	❑
	Telephone and voicemail orientation http://www.queensu.ca/its/telephone-services/tutorials with password	❑
	Indicate location of additional eating facilities on campus	❑
	Ensure buddy or work sponsor has made arrangements for coffee or lunch	❑
	Meet with the new employee at the end of the day to answer any questions	❑

New Employee Orientation Checklist…Continued

⇩	Task	Status
FIRST WEEK	Review department's mission, strategy, values, functions, policies and procedures; organization of the department; critical members of the department; departmental staff directory, department calendar	❏
	Review job description, responsibilities, competencies, and expectations	❏
	Review performance feedback and appraisal process using Performance Dialogue Process (PDP) http://queensu.ca/humanresources/management-tools/performance-dialogue-process and schedule time for probationary objective setting and follow-up	❏
	Advise the employee of the availability of individualized emergency response plans should one be required (per the AODA) http://www.queensu.ca/humanresources/wellness-accessibility/individualized-emergency-response-plans	❏
	Review faculty, portfolio and University structure	❏
	Provide overview of budget and finance procedures and polices if applicable (travel, P-Card usage, consulting, hospitality, reimbursement)	❏
	Review key general university policies (including but not limited to: accommodation in the workplace, conflict of interest, acceptable IT use, harassment, and travel expenses) http://queensu.ca/humanresources/policies and if applicable, the appropriate Collective Agreement.	❏
	Arrange for any required training (computer software, HR PeopleSoft, and other departmental specific training) Computer software tutorials and resources are available through ITS: http://www.queensu.ca/its/help-support/self-help	❏
	Mandatory AODA training suite is available on-line at http://www.queensu.ca/equity/training There are three on-line modules that must be completed by all employees: Accessible Customer Service, Human Rights 101 and Access Forward. Any employees involved in education or training must also complete a fourth module: Accessible Instruction for Educators	❏
	Mandatory Occupational Health and Safety training involves two components. An on line module is required to be completed within two weeks of hire and is accessed at the following link: http://www.safety.queensu.ca/training/health-and-safety-orientation-training	❏
	Violence & Harassment training is also mandatory, which is included in the First Day Orientation session. Face-to-face training sessions are scheduled periodically at the departmental level. Hiring Managers should contact Environmental Health & Safety via email to safety@queensu.ca to coordinate this training if missed at the First Day Orientation session.	❏
	Provide meaningful work for the new employee – either training or substantive work	❏
	Provide a list of key contacts who can address the new employee's questions on a variety of issues	❏
	Gather feedback about the orientation session from new employee	❏
	Ensure that a senior leader (in the new employee's office) welcomes the new employee	❏
FIRST TWO WEEKS	Order business cards, where required, from Queen's Printing Services' online ordering system (PrintSYS) http://queensu.ca/printing/online-ordering-system and a name plate from ADV Creative Design Services 613-533-6966 or ext. 36966	❏
	Arrange a tour of campus with Buddy or Work Sponsor	❏
	Review university and department website	❏
	Schedule regular 1:1 meetings on an ongoing basis to provide ongoing coaching and feedback	❏
DURING PROBATION	Review and discuss the employee's performance objectives	❏
	Develop a plan to assess development and performance throughout the probationary period.	❏
	Assess progress during probationary period as per Queen's human resources policy or the applicable collective agreement http://queensu.ca/humanresources/policies/employment/probation-period http://queensu.ca/humanresources/employee-tools/unions-and-associations. If success of the probationary period is in question, contact your HR Advisor immediately.	❏
	If success in the probationary period is reached, meet with the employee to confirm and congratulate them on successful completion.	❏
	Continue to clarify roles, responsibilities and expectations as needed and provide regular ongoing coaching and feedback during your regular meetings.	❏

First Discussion Talking Points

- Introduce yourself, and talk about your role, how long you have been in this role and your background. You may want to include something personal for example your favourite sport, leisure activity, or hobby.
- Discuss how your department/faculty fits into the structure of the University and the role you play in supporting the University's strategic initiatives.
- Talk about your personal style as a manager and your expectations for employee's that work with you (i.e. do you prefer phone calls, emails, or texts. Do you have an "open door policy", or do you prefer people to schedule time with you in advance? What is your general managerial style? How can someone best work with you?)
- Let the employee know how often you will be meeting to review/discuss work and give feedback and whether it will be informal or formal.
- Ask them if they have any questions or if they need any resources. If the employee is new to Kingston, ask them if there is anything specific you could do to help in their transition such as providing directions, information on the city, links to Kingston Economic Development Corporation (KEDCO) or obtain information from Life in Kingston, Faculty Recruitment and Support Program, Office of the Provost & Vice Principal (Academic Office).

Probationary Assessment

- Do an assessment of the employee's performance – are they fully engaged and seeing themselves as a valued contributor?
- Are they meeting performance expectations as outlined?
- Have they enrolled in Learning and Development programs?
- Identify on-going training needs
- To discuss performance concerns, contact your HR Advisor immediately
- Acknowledge successes

Check-in questions

These questions are helpful to assist in guiding conversations and helping you to assess how the new employee is doing and where they may need additional coaching and/or support

- What is going well?
- What challenges are you experiencing?
- What would you like to know more about?
- What has been the highlight so far?
- What suggestions do you have for improvement?
- What are your goals?
- What do you need from me as your manager to help you succeed?

One-year performance review

See Performance Dialogue Process PDP or use the process currently being used by your department. Ensure a senior leader sends a congratulatory email or letter on the employee's one-year anniversary.

Sample welcome email to the team:

To: Team
From: Manager

Subject: Welcome Name of new employee

Dear Team:

I am very pleased to announce that Name will be joining our team as Title. His/Her first project will be XXXXX, or he/she will be focusing on XXXXXX.

Name comes to us from previous employer/school, where he/she was a XXXXX for # of years. Before that, he/she worked XXXXX. Name brings list capabilities/competencies, or how they will be contributing to the team. Include something personal such as hobbies, sports or interests if known.

Name's first day will be MM/DD/YYYY, and he/ she will be located spot/building/floor. I will bring Name around for initial introductions, but please feel free to stop by and introduce yourself and welcome Name to our department/faculty.

Please join me in welcoming Name to our team

Sincerely,

Manager

Orientation Toolkit for Assigned Buddy or Sponsor

Your role is to welcome the new employee and be there as a resource or "go-to" person. It is recommended that you give the new employee a call or send them an email a few days before his/her first day.

Below is a sample of pre-first day telephone talking points:

- Introduce yourself. Include where you work, how long you have worked there and maybe something personal about yourself such as interest/sports/hobbies.
- Explain your role. You are there to help them through their orientation and will be their "go-to" person should they have any questions or concerns.
- Learn the correct pronunciation of the person's name and ask which name they prefer be used.
- Let them know that you will be meeting them for lunch and should they choose to bring their lunch, there are kitchens that are easily accessible as well as many options to purchase their lunch.
- Repeat your name, position, and contact details.

Sample email:

To: New Employee
From: You the "buddy"

Subject: Welcome to Queen's University or specific department/faculty

Dear Name:

Welcome to Queen's University, department/faculty/school of XXXXX! We are excited that you will be joining us on your first day MM/DD/YYYY.

I will be your new employee buddy, someone who can help you to get settled on your first day, show you around, answer any questions you may have, and serve as a resource over your first few weeks.

Let's begin by meeting for lunch on MM/DD/YYYY. I will come and meet you at 00:00. You can either bring your lunch from home, or I can show you a few places where you can purchase your lunch.

If you have any questions between now and then, please feel free to send me an email or call me at 613 533-6000, ext. #####.

Looking forward to meeting you!

Sincerely,

Your Name

Orientation Toolkit for the New Employee

Whether you are new to the University, new to Kingston, new to your role, or all of the above, there are many opportunities to sharpen your skills, and deepen your knowledge here at Queen's University. Discuss your learning and development interests and needs with your Manager, and then explore the Queen's Learning Catalogue.

Most workshops are offered at no cost to you as a Queen's employee. Refreshments will be served at all half-day and full-day workshops. You can register for individual workshops and lunch sessions as well as for one or more of our Certificate Programs. Obtain approval from your manager prior to enrolling to ensure adequate unit coverage.

- **Onboarding Process:** Your first opportunity for learning and development begins with the onboarding process. The Human Resources Department invites all newly hired employees (General staff, CUPE Local 229, CUPE Local 254, CUPE Local 1302, USW, Research Grant and Contract and Post Doctoral Fellows) to an orientation session which will occur every Monday morning in Human Resources. The first day orientation session will include: documentation of employee benefits; photo staff card; delivery of legislated Health and Safety training. In addition there will be a monthly informative discussion that includes mandatory Equity Training and presentations from various University departments and shared services.

- **Wellness Programs:** In addition to our professional development offerings, we have an extensive list of wellness and fitness sessions offered in partnership with Queen's Athletics & Recreation. We recognize the importance of work-life balance and strive to provide staff with accessible and inexpensive programs that give you opportunities to have fun and get fit at work.

- **Certificate Programs:**

    - Administrative Professionals at Queen's

    - Administrative Professionals Queen's Master Certificate

    - Certificate in International Perspectives

    - Certificate in Workplace Communications

    - From Diversity to Inclusion in the Workplace Certificate

If you wish to register for a workshop, or if you have any questions, please email Organizational Development and Learning at hrodl@queensu.ca

New Employee Reference Guide

This guide is intended to provide the new employee with the tools and resources they will need in order to orient themselves to their new surroundings. Please note, the required tools will vary depending on if the employee is new to the city, university or the department/faculty.

University Overview	Status
Visit and Tour Campus	❑
Quick Facts: Queen's By the Numbers and Queen's Encyclopedia	❑
Meet the Principal	❑
The Third Juncture	❑
Queen's Academic Plan	❑
Administration and Governance and Governance of Queen's University	❑
Faculty and Staff Resources	❑
Health and Safety	
Workplace Violence and Harassment	❑
Reporting a Health and Safety Incident	❑
Emergency Response Procedures and Individual Emergency Response Plans	❑
Employee Assistance Program	❑
Wellness	
Athletics and Recreation Facilities	❑
Employee Assistance Program	❑
Accommodation	❑
Equity and Human Rights	
Accessibility in the Workplace	❑
Equity	❑
Human Rights	❑
New Staff Orientation	
New Employee Orientation Session in Human Resources	❑
Further Onboarding Activities	❑
Eating Facilities on Campus	
Hospitality Services (Dining Hall and Retail Outlets)	❑
Parking on Campus	
General Information	❑
Parking Services Permit Application Request Form	❑
Information on Email, Calendar and Telephones	
Remote Email and Calendar Access	❑
Telephone Features	❑
Voicemail	❑
Information Technology Services	❑
General Reference	
Campus Map	❑
Staff Courses and Workshops	❑
Retail and Services	❑

New Employee Reference Guide cont'd

University Websites	
[Queen's Main Website](#)	❑
[Human Resources Website](#)	❑
[Department of Health and Safety](#)	❑
New to Kingston Resources	
[Life in Kingston](#)	❑
[Kingston Economic Development Corporation: Live and Work in Kingston](#)	❑
[City of Kingston](#)	❑