

Onboarding is the process of integrating your new employee into the UCOP organization and your department.

Employees decide within the first 30 days if they feel welcome and research shows that taking the time to provide introductions, tools, resources and knowledge increases employee effectiveness and job satisfaction and ultimately makes them more successful, which leads them to stay longer.

By following the recommended steps below, you will help drive one of the key initiatives outlined in the UCOP Workforce Plan for retention by providing an environment that keeps employees motivated, engaged and productive.

## Pre-Boarding

### Logistics

- Communicate with Human Resources Recruiting to ensure all technology requests have been completed
- Ensure that you are aware of the details of your new employee's Payroll appointment

### Preparing to Welcome the New Employee

- Send welcome email congratulating the new employee and providing relevant details for their first day
- Assign a Buddy from within or outside of your department, notify the Buddy and provide them with the Buddy Guidelines for clarity on the responsibilities
- Notify your team of the new employee's start date and provide a brief description of their relevant skills/experience
- Make arrangements for a virtual welcome reception
- Schedule virtual introductions with key stakeholders

## First Day

### Greeting Your New Employee

- Virtually greet the new employee
- Check that employee has computer access and orient to office applications (Slack, Zoom, Box, etc.)
- Ensure new employee understands details of meeting with Payroll to complete paperwork
- Host a virtual welcome reception and introduce new employee to fellow team members. Helpful hint: Consider a welcoming activity.
- Connect the employee to their remote "Buddy"

- Check in at the end of the day
- Follow up with the Buddy to ensure they have met with the new employee

### Technology Overview and Resources

- Review the departmental website and directory of drives
- Review UCOP website
- Provide an overview of department equipment, applications and systems
- Review Jabber
- Direct employee to the UC Learning Center for ergonomics evaluation, if needed
- Ensure registration in New Employee Orientation, Benefits Orientation and IT Orientation

### Standard Operating Procedures

- Review work/lunch/break schedules
- Review TRS-absence requests/reporting, overtime
- Review Telecommuting policy
- Discuss professional standards, office etiquette, dress code, ethics, and general UCOP culture.

### Role Specific Information

- Discuss employee's job role and responsibilities
- Ensure employee has a copy of their Job Description
- Review employee's training plan – include mandatory and on-the-job training and how to request training
- Review Mission, Vision Statement and Principles of Community

## First Week

### Getting Started with the New Employee

- Review their schedule for the first week
- Clarify expectations and job responsibilities
- Note any required training that they will need and show them how to access the UC Learning Center
- Encourage any questions about policies and procedures
- Explain how to access technical support, including the help desk number

### Start Exploring

- Check on progress regarding initial learnings and training needs
- Review performance expectations and goal-setting process
- Provide details of any award or recognition programs

- Review parameters related to the employee's probationary period
- Review organizational structure (e.g., strategic plan, goals, organization chart, key stakeholders, and reporting relationships: department and division)
- Follow-up on Buddy meetings to determine that the new employee's needs are being met

### Socialization & Work Environment

- Encourage having a virtual lunch with a coworker
- Hold a "Check-In" meeting with employee at the end of the week to discuss progress and address questions
- Schedule regular one-on-one meetings to provide performance feedback, address questions, and ensure continued building of knowledge

## Within 90 days

### Review and clarify performance objectives and expectations

- Make sure employee understands role and responsibilities and is developing team and business relationships
- Ensure timely opportunities for feedback and development

### Continue to monitor performance and provide feedback

- Maintain regular one-on-one meetings to provide performance feedback, address questions, and ensure continued building of knowledge
- Provide increasingly challenging projects, as appropriate, so employee can develop skills and you can assess employee's skills
- Continue to identify milestones, completion dates and success measures
- Acknowledge and recognize accomplishments and milestones

### Support and Resources

- Ensure employee has needed support and resources
- Provide training, as needed, to help employee understand internal systems and operating practices and obtain information and skills required for job performance
- Conduct final probation review with employee at the end of a six-month probationary period making sure that you ask employee for feedback.
- Congratulate employee on passing probation