Carnegie Mellon is a fast-paced institution where new employees are expected to get on board quickly, be adaptable and work hard. One of the most valuable ways to give new employees the best chance for success is through a well-designed, deliberate and supportive onboarding program. An onboarding program can boost retention, encourage engagement and get employees comfortable, functioning and producing more quickly. Effective onboarding practices enable a new employee to …

- Feel connected to the university and their department
- Be aware of the various resources available and know how to use them
- Realize their value and the commitment the university has to staff success
- Know what is expected of them and how to begin contributing quickly
- Become an involved and valuable member of the department

The Office of Human Resources created this guide to provide onboarding support for staff members responsible for coordinating onboarding activities. Your organization may have specific orientation guidelines, so be sure to align any practices you put into place with what might already exist.

Onboarding is …

*The process of helping new hires adjust to social and performance aspects of their jobs, and includes learning attitudes, knowledge, skills, behaviors, and social expectations required to perform effectively.*

*From Onboarding New Employees: Maximizing Success, SHRM*
FROM JOB OFFER ACCEPTANCE TO ARRIVAL OF NEW EMPLOYEE

A copy of the offer letter is sent from the hiring manager to the Workday Department Initiator. After a candidate is selected for hire in Taleo, the Taleo integration automatically creates a pre-hire record, initiates the hire process in Workday and routes the hire to the Department Initiator. The Department Initiator then locates the candidate for hire within their Workday Inbox, reviews the hire details, updates as necessary and attaches the offer letter. First- and Second-Level Approvers approve the hire.

☐ If the employee is exempt, a labor schedule should be created in Oracle.

**Communicating with the New Employee**

Once the job offer has been accepted, call or email the new employee to offer your congratulations and welcome them to your department and the university. Provide an opportunity for the new employee to ask questions, and communicate basic information about the workplace to ease anxiety and clarify important details:

☐ Inform the new employee that they will receive emails to complete initial pre-hire paperwork through the CMU Workday portal.
  - The initial pre-hire paperwork includes submitting the W-4, signing the Intellectual Property Agreement, completing part one of the I-9 form and updating personal information.

☐ To be eligible to work and to receive their Andrew ID, the new employee must complete and submit the I-9 form and documentation. To expedite the process, the new employee should visit the CMUWorks Service Center prior to their first day of employment if possible.
  - The new employee should bring to the CMUWorks Service Center the appropriate forms of identification for completing the I-9. Information about the I-9 requirements may be found on the Onboarding Checklist at [https://www.cmu.edu/cmuworks/new-hires/index.html](https://www.cmu.edu/cmuworks/new-hires/index.html).
  - Once the new employee submits the I-9 form and their documentation is verified, they will receive an Andrew ID and instructions for accessing CMU systems (email, Workday, FocusU, etc.). The new employee will also be eligible to pick up their CMU ID card (information on obtaining an ID card is listed in the Day One checklist below).

☐ Provide the new employee with logistical information:
  - Primary contact or additional contacts for the employee to ask questions going forward
  - Expected first day of employment, the time to arrive on campus and office location
  - Staff member to report to on the first day on campus
  - Standard work hours or schedule
  - Department dress code and attire expectations
  - Location/address, where to park, and additional transportation information; the employee will not be able to submit a parking permit request until they have an Andrew account

☐ Share the date of upcoming New Hire Orientation and additional resources for new employees found at [https://www.cmu.edu/hr/career/new-employees/index.html](https://www.cmu.edu/hr/career/new-employees/index.html)

☐ Identify the new employee’s Workday Role. Find information regarding Workday role assignment at [https://www.cmu.edu/cmuworks/Resources%20for%20Departments/index.html](https://www.cmu.edu/cmuworks/Resources%20for%20Departments/index.html)

☐ Email Professional Development Services at professionaldevelopment@andrew.cmu.edu indicating the new employee’s Workday role(s) and begin to check the Human Resources Calendar of Events for upcoming Workday training classes at [https://www.cmu.edu/hr/calendar.html](https://www.cmu.edu/hr/calendar.html). Please note that the new employee will not be granted access to special Workday functions until they complete the relevant training session(s).
**Preparing for the Arrival of the New Employee**

Gather information that might be helpful for your new employee to know on the first day. A new employee signals the opportunity to set a precedent of preparation and readiness for your department. It is important to have a plan in place for the employee’s first week and to provide the new employee with a full job description and brief them on important university policies. Making the new employee aware of the expectations and responsibilities associated with the new role and the university will help to ease the transition.

Prepare the new employee’s space and inform the department of their hire:

- Place a welcome sign in new employee’s office space
- Identify where the employee will be located; be sure it is clean and has the necessary equipment and supplies
- Set up phone and voicemail capabilities along with instructions for voicemail setup
- Set up the employee’s computer, verifying all necessary software is installed and hardware is operating properly
- Verify that access to the office or building will be ready for employee’s first day
- Send an email announcement to the department, division, school or college as appropriate announcing the new employee’s arrival; be sure to copy the new employee so they are aware of the information being shared.

If the new employee requires accessibility or other disability accommodations, contact Equal Opportunity Services at 412-268-3930 or employeeaccess@andrew.cmu.edu. Disability Services staff members will ensure that you and your HR Manager are given assistance in providing for any staff member accommodations. For more information on Disability Services, visit https://www.cmu.edu/hr/resources/hr-partners/disability.html.

Create a schedule of the first week for your employee. This should include any training that can be completed and meetings with key personnel within your organization. The first day might also begin and end with a face-to-face meeting with your new employee. This will help to set the tone for the workday and will give the new employee the opportunity to ask any questions that may have arisen throughout the day.
DAY ONE

On the employee’s first day, you want to welcome them to your department, division, school or college. The new employee may be excited, anxious and unsure of the path ahead. Doing what you can to make them comfortable will contribute to a successful start in the employee’s new role.

Information you should provide on the first day:

- The mission and vision statements of your department and the university
- Organizational chart for your department and division or school/college
- Departmental phone and email list
- Keys, alarm codes or items specifically related to primary or secondary work locations
- Work schedule, reporting hours, breaks, overtime, departmental PTO or floating holiday policies, process for unexpected absence, pay schedule, dress attire
- Department-specific safety and emergency information such as the evacuation route, emergency assembly point location, building alert systems and any other critical safety and security details
- It is recommended that all employees sign up to receive ALERT NOW notifications by going to http://www.cmu.edu/alert/
- Arrange for someone in the department to escort the new employee to the HUB (in the lower level of Warner Hall) to obtain their ID card. Information about ID Cards can be found at http://www.cmu.edu/idplus/idcards/index.html
- Ensure that the new employee has reviewed and is completing the Onboarding Checklist found at https://www.cmu.edu/cmuworks/new-hires/index.html.

In addition to making sure the new employee has all the information they need, there are actions that your department can take to further support the onboarding process:

- Introduce the new employee to colleagues they have yet not met or who are sharing space with the new employee
- Plan welcome activities such as a tour of the department or building where the new employee will work; consider a campus tour and lunch with colleagues
- Connect the new employee with a specific department representative to help the new employee acclimate to their new surroundings
- Prepare a schedule for the new employee’s first week to include items such as:
  - Lunch on day one and for the first week
  - Meetings the employee should attend or that have already been scheduled
  - People the employee should reach out to
  - Any training that has already been scheduled, such as New Hire Orientation
- Review the first week schedule with the new employee to see if they have any questions and to give a brief overview of the activities scheduled
WEEK ONE

While there are critical points to address on the first day, other items need to be addressed during the employee’s first week:

- Communicate any required trainings for the university or department. All university employees must complete the Preventing Workplace Harassment Online Training within the first 30 days of receiving the email notification from Professional Development Services. The employee will be provided with information on how to log in and complete the training in the email notification. Additional details are available at https://www.cmu.edu/hr/career/new-employees/onboarding/pwh.html.
- Review general office equipment use and access, telephone and voicemail etiquette, and email accounts and usage etiquette.
- Schedule a time to thoroughly review the new employee’s job description and discuss how it connects to the department’s goals, mission and vision, as well as how it contributes to the university’s success.
- Spend time discussing how information is to be shared between you and the new employee; discuss both of your preferred communication styles for giving and receiving information.
- Explain and set clear expectations for the employee’s first 30 days so they have the best chance for early success.
- Clarify how performance will be evaluated and review the provisional period timeline. The review document may be found at https://www.cmu.edu/hr/career/managers/onboarding.html.
- Discuss with the new employee the Human Resources Benefits Guide, which lists detailed benefit information and can be found at https://www.cmu.edu/hr/benefits/index.html.
- The employee will receive an email and notification in their Workday inbox to enroll in or decline benefits. The new employee must complete this task in the first 30 days of employment.

FIRST WEEKS

An employee’s transition into a new role lasts well past the first few days of employment. Continuing to provide support and reinforcing the value they add to the department will further solidify the new employee as a member of the group.

- Discuss initial projects and tasks the employee is responsible for and the resources available.
- Establish goals for the first six months to one year.
- Continue to provide regular, informative, constructive feedback during this initial time and provide any additional information to the new employee regarding your department, division, school or college.
- Connect with the employee after they attend initial meetings, participate in training and begin to interact with people outside of the department.
WITHIN THE FIRST SIX MONTHS

At this point, the employee should be getting comfortable in their role and feeling like an established member of the group. But there are still opportunities to encourage them, provide support where necessary and clarify expectations.

- Complete the new employee’s provisional review.
- Ensure necessary training is completed. Inquire as to additional training the employee feels they need or would like to take to improve productivity.
- Work with the employee to identify professional development workshops or other learning opportunities that will contribute to their productivity and professional growth.
- Continue providing regular informal feedback to discuss assignments, productivity and comfort levels. Some sample “check in” questions could be:
  - How is your job going?
  - Has the training been helpful?
  - What training would you add?
  - Do you have all the work tools you need?
  - Is there something we should be providing but are not?
  - Is there anything you feel out of the loop about?
  - Is there anything you need that you do not have access to?
  - Are there areas of your job that require additional clarification?
**BETWEEN SIX AND TWELVE MONTHS**

The new employee should be feeling comfortable in their new role. However, there is still a great deal to learn about the position, organization and university. It is easy to forget that the new employee will not know what to expect until they have completed a full year in the position. Remembering to communicate upcoming departmental events or activities to the new employee will aid them in meeting ongoing expectations. The new employee may be demonstrating an interest in learning more about the department or showing readiness to take on additional responsibilities. Some things you can do to support this phase in a new employee’s transition are:

- Hold routine meetings with the employee to discuss upcoming activities or work responsibilities
- Acknowledge successes with recognition of contributions and evaluate where improvement is possible
- Provide opportunities for the employee to get involved with departmental projects outside of their comfort zone
- Discuss career plans for the future, highlighting the opportunities available for advancing skills and abilities

This is an important opportunity to seek feedback as a supervisor. The first year of your employee’s time at Carnegie Mellon University has required you to provide feedback to help increase productivity and efficiency within your organization. However, now that one of your employees has been a product of the onboarding process, it is essential that you understand how you can increase your effectiveness.

Some questions to ask might be:

- Is the job that you expected?
- Do you have enough opportunity to learn and grow?
- What is the best and worst thing that happened to you throughout the year?
- How can the process be improved?

**ONGOING**

As the employee completes their first year with the university, consider having a conversation regarding the onboarding process, asking for specific feedback on areas such as: what about the program was beneficial to the employee, what recommendations would the employee make to enhance the program, and would they be interested in assisting other employees in their transition process.

In addition, you should:

- Meet with the new employee and any staff member who was working with the new employee through the transition period to check on how things went and what suggestions they have
- Continue to provide informal feedback in addition to the annual performance review
- Encourage your new employee to get involved with the university community; information about involvement opportunities can be found at [https://www.cmu.edu/hr/work-life/get-involved/index.html](https://www.cmu.edu/hr/work-life/get-involved/index.html)
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