The Hiring Manager’s Guide to Staff Onboarding at CMU

Carnegie Mellon University is a fast-paced institution where new employees are expected to assimilate quickly, be adaptable and work hard. One key way to give new employees the best chance for success is through a well-designed, deliberate and supportive onboarding program. An effective onboarding program boosts retention, encourages engagement and gets employees comfortable, functioning and productive quickly. Onboarding at CMU is designed to help new employees achieve the following:

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

The Office of Human Resources created this guide to provide onboarding support for CMU employees responsible for coordinating onboarding activities. Your organization may have specific orientation guidelines, so be sure to align any practices you put into place with those that 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

Communicating with the New Employee — HR Service Center

1. Welcome Email from the HR Service Center: Once a job offer is accepted in Taleo, the HR Service Center sends a welcome email to the new hire introducing the HR Service Center as the new hire’s contact for onboarding questions, including Form I-9, benefits, Workday and Payroll. The email provides a link to the HR Service Center’s New Faculty and Staff page, which contains information on key onboarding tasks and step-by-step instructions for obtaining their Andrew ID, creating their password, completing the Form I-9, setting up DUO 2fa, enrolling in benefits, and more.

2. Onboarding Pilot Program Participants Only: In addition to the welcome email, pilot program participants will receive a second, personalized email from the HR Service Center (with the hiring manager copied) containing the following important onboarding information:
   - Introduction of the new hire’s personal contact in the HR Service Center for questions concerning onboarding, benefits, Workday and payroll. New staff member are assigned a personal contact within the HR Service Center to facilitate onboarding.
   - A link to the HR Service Center website and a reminder that the website is the go-to place to ensure a successful onboarding experience.
   - Reminder to complete the Prior Affiliation Questionnaire (PAQ), if applicable, and create an Andrew ID password and DUO 2fa.
   - Reminder to complete the first set of Workday onboarding tasks:
     - Form I-9 Section 1
     - Personal Information, including gender, date of birth, race/ethnicity, citizenship and military service
     - Review Documents, in which the new employee electronically signs the Workers' Compensation Acknowledgment (if applicable), Intellectual Property Policy, Faculty and Staff Retirement Plan Universal Availability Notice and the Retirement Savings Plan Information (employees working in locations other than Pittsburgh may have additional documents to review.)
     - Disability Self-Identification

3. Onboarding Pilot Program Participants Only: A final email is sent to the new employee a few days prior to their start date:
   - Confirmation of hire date and onboarding session enrollment (including guidance to schedule an appointment to complete the Form I-9 Section 2)
   - A list of things to bring to the onboarding session, including required documentation for the completion of Form I-9 Section 2, dependent verification and payment elections
Communicating with the New Employee — Hiring Manager

Once a job offer has been accepted, the hiring manager is encouraged to call or email the new employee to offer your congratulations and welcome them to your department and the university. Remember to communicate basic information about the workplace, clarify important details and encourage the new employee to ask questions:

- Helpful logistical information to give your new employee:
  - Confirm their intention to attend an onboarding session (pilot program only).
  - Standard work hours or weekly schedule
  - Department dress code and attire expectations
  - Building location and physical work location address

- Identify the new employee’s Workday role(s). Find information regarding Workday role assignment at https://www.cmu.edu/my-workday-toolkit/roles/index.html.

- Email the Office of Human Resources’ Learning & Development department indicating the new employee’s Workday role(s) and check the Human Resources Calendar of Events for upcoming Workday training sessions at https://www.cmu.edu/hr/calendar.html. Please note that the new employee will not be granted access to special Workday functions until required training is complete.

Preparing for the Arrival of the New Employee

A new employee affords your department the opportunity to set a precedent of preparation and readiness. Gather information that might be helpful for your new employee to know on the first day. Have a plan in place for the employee’s first week. Provide the new employee with a full job description. Brief them on important university policies. Making new employees aware of the expectations and responsibilities associated with their new role at the university will help ease their transition.

Prepare the new employee’s space and inform the department of the hire:
- Identify the new employee’s work location; 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.
- Place a welcome sign in the new employee’s office space.
- Verify that access to the office or building will be ready for the 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 the Office of Human Resources at 412-268-3930 or employeeaccess@andrew.cmu.edu. A Disability Services representative will ensure that you and your HR business partner 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.
DAY ONE

(Employees participating in the onboarding pilot program will likely attend an onboarding session prior to arriving at their work location.) Day one should be a day of welcome and reassurance. The new employee may be excited, anxious or unsure of the path ahead. Take time to show them around and answer questions. Doing what you can to make new hires comfortable will contribute to a successful start in the new role. 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 and other items specifically related to primary or secondary work locations
- Work schedule, departmental PTO or floating holiday policies, process for unexpected absence, pay schedule
- Departmental dress code or expectations
- For nonexempt employees: reporting time worked, breaks, and overtime rules and procedures
- 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
In addition to making sure your new employee has all the information necessary to get started, your department is encouraged to take the following actions in support of effective onboarding:

- Introduce the new employee to colleagues they have not met, especially those who will be sharing space with the new employee.
- Plan welcome activities such as a tour of the department and work location, including noting the location of restrooms and kitchen facilities; consider a campus tour and lunch with colleagues.
- Connect the new employee with a departmental representative to serve as a resource and help the new employee acclimate to new surroundings.
- Prepare a schedule for the new employee’s first week that includes items such as:
  - Lunch with a different colleague each day of the first week
  - Meetings the employee should attend or schedule
  - People the employee should reach out to
  - Any training that has or should be scheduled, such as new hire orientation
- Review the week-one schedule with the new employee to answer questions and give a brief overview of the scheduled activities.

Whenever possible, the first day should include an end-of-the-day, face-to-face meeting between the new employee and the supervisor. The meeting can be brief, just long enough to set the tone for the workday and give the new employee an opportunity to ask some of the questions that came up during the day.
**WEEK ONE**

While there are critical tasks to address on the first day, other timely items can postponed to later in the first week:

- Communicate any required training 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 the Office of Human Resources. The employee will receive information via email on how to log in and complete the training. Additional details are available at [https://www.cmu.edu/hr/career/new-employees/onboarding/pwh.html](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 the employee’s duties align with the department’s goals, mission and vision, as well as how the work contributes to the university’s success.
- Spend time discussing how information is to be shared between you and the new employee; discuss your preferred communication style, and ask how the new employee prefers to give and receive information.
- Set clear expectations for the employee’s first 30 days, so they have the best chance for early success.
- Explain how performance is evaluated, and review the provisional period timeline. The review document can be found at [https://www.cmu.edu/hr/assets/hr/provisional-review.docx](https://www.cmu.edu/hr/assets/hr/provisional-review.docx).

**FIRST WEEKS**

An employee’s transition into a new role extends well beyond the first few days of employment. Continuing to provide support and reinforce the value added to the department will solidify the new employee as a member of the team.

- 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 new information regarding your department, division, school or college as it arises.
- Connect with the employee after meetings with new people or on new projects, participation in training and interaction with people outside the department.
WITHIN THE FIRST SIX MONTHS

At this point, the employee should be getting comfortable in the role and feeling like an established member of the group. But continue to look for opportunities to encourage, provide support, and, when necessary, clarify expectations.

- Complete the new employee’s provisional review.
- Ensure necessary training is completed. Inquire as to additional training the employee would like to take to improve productivity and personal growth.
- Work with the employee to schedule professional development workshops or other learning opportunities that will contribute to productivity and professional growth.
- Continue providing regular informal feedback in discussions about assignments, productivity and comfort levels. Some sample “check in” questions are listed below:
  - 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

Your new employee should be feeling confident in the role. Remember, however, there is still a great deal to learn. Many new employees feel as though they are still getting to know the position, the organization and the university up to a full year after their start date. Remembering to communicate upcoming departmental events, initiatives, and activities to new employees will help them meet ongoing expectations and assess their own 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 by recognizing contributions and provide constructive feedback when expectations are not met.
- 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.

The employee’s one-year anniversary is an opportune time to seek feedback as a supervisor. The first year of an employee’s time at an organization requires the supervisor to provide ongoing information and feedback to develop the productivity and efficiency the new employee needs to meet or exceed expectations. Now that your employee has completed that first year, take a moment to seek feedback on how you can increase your effectiveness as a supervisor of new employees.

Some questions to ask might be:

- Is the job what 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?
IMPROVING ONBOARDING

As your employee completes the first year with CMU, consider having a conversation regarding the onboarding process, asking for specific feedback on how the new hire experience can be improved

- What about the onboarding program was beneficial to you?
- What recommendations would you make to enhance the onboarding program?
- Would you be interested in assisting other employees in their transition process?

In addition, you might:

☐ Meet with colleagues who worked with the new employee through the onboarding process to gain additional feedback on how things went and suggestions for improvement.

☐ 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.
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