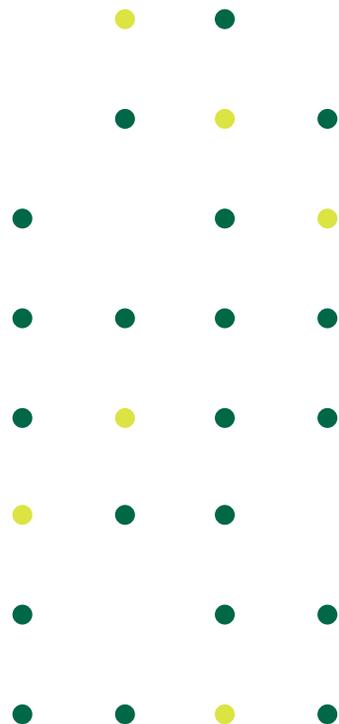


ONBOARDING GUIDE

University of South Florida



TALENT DEVELOPMENT
usf.edu/hr-training | Version 1.0



UPON OFFER BEING ACCEPTED

TASK	OWNERSHIP	COMPLETION DATE
<p>Send a welcome email.</p> <p><i>Note: Communicate with the employee that they are unable to work on their first day if their to-do items are not done</i></p>	Supervisor	
<p>Notify leadership of the new hire and provide details.</p> <p><i>For example: Name, title, location, start date, department, and Supervisor</i></p>	Supervisor	
<p>Initiate/Follow-up on the background check.</p> <p><i>Note: This could be an HR partner/admin or employees within your own department activating this.</i></p>	Recruiter Supervisor	
<p>Contact new hire to validate welcome email has been received and answer any questions they may have regarding action items.</p> <p><i>Note: Communicate with the employee that they are unable to work on their first day if their to-do items are not done</i></p>	Supervisor	
<p>RightStart and background check items have been completed and approved. This step may be required before ordering equipment.</p>	Supervisor	
<p>Order equipment and notify the Supervisor of what is and isn't being provided.</p>	Admin Supervisor	
<p>Coordinate desk place working location.</p>	Admin Supervisor	
<p>Confirm the new hire has completed the NetID and U-Number process.</p>	Supervisor	
<p>Review and prepare for first-day and week tasks.</p>	Supervisor	

WEEK BEFORE ARRIVAL

TASK	OWNERSHIP	COMPLETION DATE
Validate that no additional action is required on RightStart items or background check, if not completed.	Recruiter Supervisor	
Identify and add to the applicable email lists, reoccurring meetings, and mandatory meetings that the new hire will need to be included on.	Supervisor	
Notify and add the new hire to any upcoming meetings as an introduction agenda item.	Supervisor	
If applicable, identify and assign the new hire their Ambassador. Meet with the Ambassador to determine meeting frequency and approach with new hire.	Supervisor Ambassador	
Based on the frequency discussed with the Supervisor, schedule reoccurring meeting times during the new hire's first month.	Ambassador	
Identify and itemize necessary training(s) and schedule, as applicable.	Supervisor	
Identify and itemize necessary reading materials for beginning days when the new hire has downtime. <i>For example: review policies, procedures, benefit information, department website, etc.</i>	Supervisor	
Coordinate welcome day activities, welcome card, and any USF welcome items or swag.	Supervisor Admin (swag)	
GEM access/request	Supervisor	
Educate on ID usage	Supervisor	
Schedule and request a meeting a skip level meeting within the first two weeks	Supervisor Admin	

TASK	OWNERSHIP	COMPLETION DATE
Schedule coffee and conversation with the department/team for the first week. Notify admin to schedule within the first week.	Supervisor	
<p>Prepare workspace, office supplies, phone number, and computer.</p> <p><i>Disclosure: This is based on the completion of paperwork, NetID, and background check being completed. This should include a thorough cleaning, ensuring all areas are wiped down, removing miscellaneous items and tape from where things were taped up, phone and computer wiped down, drawers emptied, and personal items removed. Ensure that the workspace is clear of files, boxes, binders & other items. Determine what needs to be retained or disposed of. Make sure the workspace has office supplies such as pens, highlighters, scissors, stapler with staples, dispenser with tape, and post-it notes.</i></p> <p>NOTE: For Remote employees sendoff other equipment, as needed.</p>	Admin + Supervisor	
<p>Send an email summarizing first-day expectations.</p> <p><i>For example, start time, meeting location, parking, payroll, reminder of any documents needed, dress code, contact information for Supervisor if needed, etc.</i></p>	Supervisor	
<p>Share new hire information with admin to share on department-wide communication.</p> <p><i>Note: Template to include a picture, short bio, resume (for skip level), and fun fact</i></p>	Supervisor	
<p>Notify applicable admin of addition(s) to the team by providing name, title, and attach a photo to update staff directory and website.</p>	Supervisor	

DAY BEFORE ARRIVAL

TASK	OWNERSHIP	COMPLETION DATE
<p>Validate that no additional action is required on RightStart items or background check, if not completed.</p> <p><i>Note: Communicate with the employee that they are unable to work on their first day if their to-do items are not done.</i></p>	Recruiter Supervisor	
<p>Contact the new hire the day before starting to answer any outstanding questions.</p> <p><i>For example, start time, meeting location, parking, payroll, reminder of any documents needed, dress code, contact information for Supervisor if needed, etc.</i></p>	Supervisor	
Follow-up on staff directory and website.	Supervisor	
Set up any external access computer systems or logins.	Supervisor	
Schedule weekly one-on-ones between Supervisor and new hire.	Supervisor	
Place welcome card and USF swag on desk, if not remote.	Supervisor	

FIRST DAY | MORNING

TASK	OWNERSHIP	COMPLETION DATE
Schedule applicable coffee + conversation with anyone on the team.	Supervisor	
Show desk space where welcome card and USF swag are placed.	Supervisor	
Ensure the new hire has their staff ID card and demonstrate how it is utilized in designated areas.	Supervisor	
Provide a copy of the job description and review job functions, competencies, and expectations. Contact Recruiting if you need assistance locating this information.	Supervisor	
Review security, safety, and confidentiality procedures.	Supervisor	
Review department safety plan: Emergency Evacuation Plan, first-aid supplies, and MoBull sign-up.	Supervisor	
Update emergency contact information in GEMS.	New Hire	

FIRST DAY | AFTERNOON

TASK	OWNERSHIP	COMPLETION DATE
Conduct a tour of working areas, appropriate parking lots, arrival/leaving timing, building, break room, supply closet, other appropriate facilities, etc.	Supervisor or Coworker	
Introduce new hire to the team and/or one to two others in similar roles to support with orientation to the department.	Supervisor	
Introduce to the designated Ambassador.	Supervisor	
Discuss breaks, lunch, and overtime.	Supervisor	
Discuss time reporting and pay schedule resources.	Supervisor	
Discuss leave policy/reporting, accrual, and use of sick leave time.	Supervisor	
Discuss support with direct deposit, if not already set-up or needed [W4 + direct deposit].	Supervisor	
Discuss Employee Success Center and review Onboarding.	Supervisor	

END OF DAY

TASK	OWNERSHIP	COMPLETION DATE
Discuss benefit and retirement resource locations and remind them of deadlines. Connect with a Benefits Department contact by emailing benefits@usf.edu .	Supervisor	

FIRST WEEK

TASK	OWNERSHIP	COMPLETION DATE
Provide an overview of the following: <ul style="list-style-type: none"> • USF Leadership: BOG, BOT, President, Senior Leadership • USF mission and goals, • USF strategic plan 	Supervisor	
Review the organizational structure of your department.	Supervisor	
Review the department's values, mission, and strategic plan/approach.	Supervisor and/or Ambassador	
Validate access to any external computer systems that are needed.	Supervisor	
Set up voicemail.	New Hire	
Demonstrate use of the USF online directory. <ul style="list-style-type: none"> • USF Directory • Department directory (if applicable) 	New Hire	
Explain the USF performance management process. <ul style="list-style-type: none"> • Performance Management 	Supervisor	
Provide an overview of the following: <ul style="list-style-type: none"> • Recycling • Microsoft Outlook • Office supplies • Phone: Transfer calls, conference calls, etc. • Internal USF mail procedure • Configure printer settings 	Supervisor	
Share and provide a list of department phone numbers and key resource people.	Supervisor and/or Ambassador	
Set up one-on-one meeting with the department head and any other staff.	Supervisor	

TASK	OWNERSHIP	COMPLETION DATE
Officially introduce the new hire to the entire department.	Supervisor	
Meet with the new hire to inquire about their first-week experience and provide direction for upcoming weeks.	Supervisor and/or Ambassador	
Allow time for the new hire to complete compliance and policy training to ensure access is received.	Supervisor	
<p>Discuss the following topics:</p> <ul style="list-style-type: none"> • Attendance and punctuality • Florida Sunshine Law • Budget procedures • Probationary period (if applicable) • Dress guidelines • Work schedule • Internet access • Travel • Timesheets • Email regulations/signature • USF holidays • University Work Groups • Employee Resource Groups 	Supervisor and/or Ambassador	
Review USF perks and athletic tickets.	Supervisor and/or Ambassador	
Send employee assistance program information.	Supervisor and/or Ambassador	
Working tour of campus, if applicable.	Supervisor and/or Ambassador	
Confirm with the new hire that time is set up for a skip level meeting (this should be no longer than two weeks from the start date)	Supervisor	

AFTER FIRST WEEK THROUGH 30 DAY

TASK	OWNERSHIP	COMPLETION DATE
Clarify role, responsibilities, measurements, expectations, and model acceptable behaviors.	Supervisor	
Review the position description to begin drafting and setting long-term performance goals.	Supervisor With New Hire	
Set short-term goals to reach within the first 30 days.	Supervisor with New Hire	
Schedule reoccurring connection calls, such as one-on-one connections and monthly productivity meetings. <i>Focus on getting to know and understanding the employee as a person, how they prefer to be communicated with, how they prefer to receive feedback, while also creating a safe space for them to share feedback as well.</i>	Supervisor	
Allocate additional time for the new hire to complete any required compliance, policy, and systems training.	Supervisor	
Follow-up: Confirm with the new hire that they have had a skip level meeting or that one is scheduled.	Supervisor	
Check in on Benefits enrollment. <i>Share benefits@usf.edu contact information use if needing to do a review of options.</i>	Supervisor	
Schedule or delegate scheduling meetings with key partners internally/externally.	Supervisor	
If applicable, elaborate further on the reoccurring meetings the new hire will be required to attend.	Supervisor	
Revisit department safety plans since the new hire is likely more familiar with their working space.	Supervisor	

ON DAY 30

TASK	OWNERSHIP	COMPLETION DATE
<p>Pose the 30-day evaluation questions to the new hire while encouraging them to be transparent and honest with their feedback.</p> <ul style="list-style-type: none"> • <i>How does the job compare to your expectations?</i> • <i>Do you have the information, tools, resources you need to do your job successfully?</i> • <i>Are you feeling welcomed by other employees, staff, and leadership?</i> • <i>What roadblocks to meeting your responsibilities in the position have you experienced?</i> • <i>How does your position allow you to feel productive and effective? Can you discuss why or why not?</i> • <i>What specific training do you feel you need to be successful?</i> • <i>If applicable, how are your Ambassador check-ins going? Do you feel like it's a good fit? Can you discuss why or why not?</i> • <i>What feedback do you have that could have improved your onboarding experience?</i> • <i>Do you feel you are receiving enough feedback and assistance from me, Ambassador, team, etc.?</i> • <i>What would you change about the onboarding process to better prepare you for the position?</i> 	<p>Supervisor</p>	

31 – 60 DAYS

TASK	OWNERSHIP	COMPLETION DATE
Allocate additional time for the new hire to complete any required compliance, policy, and systems training.	Supervisor	
Check in on Benefits enrollment. <i>Share benefits@usf.edu contact information use if needing to do a review of options.</i>	Supervisor	
Discuss progress of short-term goals set within first 30 days. <i>Discuss obstacles, successes, and progression</i>	Supervisor	
Confirm or follow-up on any access requirements for the position.	Supervisor	
Follow up from first 30 days Review position description and follow-up/set performance goals. <ul style="list-style-type: none"> • <i>How do you feel you are pacing toward your goal(s)?</i> • <i>How can we help you achieve your goal(s) for the next 30 days?</i> 	Supervisor	

ON DAY 60

TASK	OWNERSHIP	COMPLETION DATE
<p>Pose the 60-day evaluation questions to the new hire while encouraging them to be transparent and honest with their feedback.</p> <p><u>ONBOARDING</u></p> <ul style="list-style-type: none">• <i>How has your training in the first 30 days set you up for success in the following 30 days?</i>• <i>What about our onboarding process has worked best in getting you up to speed?</i>• <i>What areas, tasks, or projects have you enjoyed the most so far?</i>• <i>What skills have you developed or strengthened?</i>• <i>What skills would you like to opportunity to develop or enhance over the upcoming weeks? (partner with someone on team, build relationships)</i>• <i>Are there any elements of the position you are not enjoying? (Is this due to the lack of proper tools or training?)</i> <p><u>TEAM/ORGANIZATION</u></p> <ul style="list-style-type: none">• <i>What have you enjoyed most about your team?</i>• <i>How has your team been helpful (or not) during your onboarding?</i>• <i>What successes/roadblocks have you experienced with your team, processes, etc.?</i>	Supervisor	

61 – 90 DAYS

TASK	OWNERSHIP	COMPLETION DATE
Conduct a review meeting and provide detailed feedback regarding their performance. Discuss successes and areas for growth.	Supervisor	
<p>Follow up from 30 – 60 days Review position description and follow-up on performance goals.</p> <ul style="list-style-type: none"> How do you feel you are pacing toward your goal(s)? How can we help you achieve your goal(s) for the next 30 days? 	Supervisor	
Based on follow-up, create new performance goals using the SMART goals approach for the upcoming year.	Supervisor	
Discuss information about continuing educational opportunities, special programs, and events or activities that may relate to the employee's interests and professional development.	Supervisor	
<p>Continue to meet during one-on-one connections and provide regular, informal feedback about the new hire's job assignment, productivity, and acclimation.</p> <p>Ensure the employee feels and has the following items:</p> <ul style="list-style-type: none"> Role clarity Self-efficacy Community Confidence 	Supervisor	
Schedule or offer additional skip-level meeting time	Supervisor	