Onboarding
Remote Workers

Human Resources

UNIVERSITY OF COLORADO **BOULDER**

Onboarding Remote Workers

Definitions

- **Activate:** Performing set-up tasks to ensure payroll, benefits, logistics, schedule, and technology needs are met.
- **Clarify:** Understanding of new job, competencies, expectations and how role fits into the university mission.
- **Connect:** Forming interpersonal relationships and organizational, work and knowledge networks.
- **Excel:** Applying full range of competencies and skills to appropriate degrees of autonomy.

Activate

- ☐ **Prepare for your new hire's arrival**
  - ☐ Create an itinerary for the first week: use the [First Week Itinerary Template -Remote Worker](#)
  - ☐ Draft a welcome email to your new hire: use the [Welcome Email Template - Remote Workers](#)
  - ☐ Order computer and any technological tools as far in advance as possible
  - ☐ Arrange for phone setup (can take up to two weeks)

- ☐ **Communicate with your new hire**
  - ☐ Explain what to expect the first day or week.
  - ☐ Include a first week schedule or itinerary, if available.
  - ☐ If your department participates in the QuickStart Center, they will receive checklists from *New at CU*. If you do not participate in the QuickStart Center, then we recommend sharing the [New Employees webpage](#) with your new hire.

- ☐ **Communicate with your department or team**
  - ☐ Introduce your new hire and share when they will be joining the unit.

- ☐ **Arrange for technology and IT services**
  - ☐ Make sure arrangements are in place for the pick-up or delivery of university supplied technology.
  - ☐ Schedule set-up time with IT support, if applicable.
  - ☐ For those not on campus technology, ensure they know how to access:
    - ▪ [Email](#)
    - ▪ [Zoom](#)
    - ▪ [VPN](#)
    - ▪ [Microsoft Teams](#)

☐ **Create a mandatory/required training checklist**

  ☐ Mandatory Discrimination and Sexual Misconduct Training

  ▪ This training is offered by the CU Boulder Office of Institutional Equity and Compliance (OIEC). CU Boulder requires all employees (faculty, staff, and student staff) and affiliates to complete the required OIEC training on Discrimination and Sexual Misconduct **every three years** after initial completion when new to the Boulder campus. Some departments require employees to complete the training more frequently.

  ▪ **Instructions:** Select the Boulder campus and after logging in, the course will automatically load in a separate window. The course title is "Discrimination and Sexual Misconduct, CU Boulder and System." After successfully passing the course, it takes approximately 3 business days for the score to be reflected in an employee's training record. **Access the Discrimination and Harassment Mandatory Training**

  ☐ Campus Security Authority Training: *For those designated as a Campus Security Authority*

  ▪ Campus Security Authority training is required for all campus security authorities, including CU faculty and staff members with significant responsibility for student and campus activities. It focuses on learning the crime-reporting requirements under the Clery Act. The Clery Act requires gathering crime data from a wide variety of campus security authorities (CSA) and publishing it to ensure students know about dangers on campus.

  ☐ Access Based Training

  ▪ Check with your supervisor or department HR liaisons about applications or systems access (e.g. CU-SIS, HCM, CU Finance, CU-Data, Marketplace) you need access to for your role. Visit the Request Access page to understand training requirements to request access.

  ▪ Common Systems:

  • CU Student Integrated Systems (CU-SIS) Access

    o Student Integrated Systems (CU-SIS): FERPA training is mandatory for any system access and can be completed through Skillsoft

  • Human Capital Management (HCM) Access

  • Finance and Marketplace Access

    o Campus Controller's Office

  • Travel Card

  • Procurement Card

☐ **Give time to attend onboarding programs**

  ☐ **QuickStart Center:** The Virtual QuickStart Center is held on *most Mondays from 9:00 a.m. to 10:00 a.m. (MST/MDT) via Zoom. The purpose of the QuickStart Center is to

provide you with tools and resources to complete set-up tasks such as portal actions, benefits enrollment, direct deposit, required training and more. Departments that are opted in are part of an automatic invitation process. If your department is not opted in, contact newatcu@colorado.edu for information.

- ☐ **New Employee Welcome Experience:** This course connects new hires and shares the story of how CU Boulder became the institution it is today.
- ☐ **CU Discover Webinar Series**: Held monthly, these 1-hour webinars present an opportunity to learn more about working in Higher Education and at CU Boulder.

☐ Optional: Plan a campus visit

- ☐ Arrange for a tour of department/ building.
- ☐ Arrange for a campus tour if they have not had one.
- ☐ If they will periodically be on campus, ensure they have the right keys/ access.
- ☐ Explain parking and transportation options for getting to campus.
- ☐ Have lunch with the employee on campus or at a nearby restaurant.

Clarify

☐ Establish Expectations

- ☐ Establish expectations:
  - ▪ Work hours or schedule.
  - ▪ Requesting time off.
  - ▪ Ideal means of communication.
  - ▪ Workplace norms and behavior.
  - ▪ If/when in-person meetings/ events are mandatory.
  - ▪ Requesting space on campus/ conference rooms.

☐ Performance Management

- ☐ Performance
  - ▪ Review position and responsibilities.
  - ▪ Create performance plan in the first 30 days.
  - ▪ Meet with new hire to go over the plan.
- ☐ Competencies, Goals, and Imperatives:
  - ▪ Discuss University Staff Competencies, if applicable.
  - ▪ Share how work aligns with goals of unit.
  - ▪ Align goals to campus strategic imperatives, if applicable.

- ☐ **Create Understanding of Where They Work**
  - ☐ Give your new hire an orientation on the college, school, institute, division, or department in which they work. Include:
    - ▪ History
    - ▪ An introduction to upline leadership
    - ▪ Mission, Vision, Values, Strategic Plan
    - ▪ Diversity & Inclusion Initiatives
    - ▪ Information about your constituents
    - ▪ An overview of how your unit/team supports the overall organization
- ☐ **Review applicable campus and department policy/ processes**
  - ☐ [Travel and Purchasing](#)
    - ▪ Travel policies and procedures
    - ▪ University credit card policies
    - ▪ University travel services
    - ▪ Expense report procedures
    - ▪ Purchasing policies/procedures
  - ☐ The [Campus Policies website](#) communicates how University business is conducted at CU Boulder. We recommend employees familiarize themselves with all policies.
  - ☐ College, School, Institute or Department policies

Connect

- ☐ **Stay connected as a supervisor**
  - ☐ Schedule a first day meeting with your new hire.
  - ☐ Schedule a series of 1:1 meetings with your new hire regularly.
  - ☐ Go over process for if new hire needs additional time scheduled with you.
  - ☐ Explain whom the new hire may go to with questions/concerns to when supervisor is not present (informally arrange this with a co-worker of the new hire)

- ☐ **Help build their networks**
  - ☐ Work Networks coordinate and cooperate through knowledge and trust **to accomplish work** and build **strong working relationships**.
    - ▪ Set-up meetings or give new hire a list of colleagues in the unit/department to meet with in the first few weeks. Meeting goals should include:
      - • Becoming familiar with colleagues they will be working with.
      - • Creating and understanding of the different roles in unit.
  - ☐ A knowledge networks is comprised of individuals and teams who come together **across organizational and disciplinary boundaries** to share a body of knowledge. It captures, transfers, and creates knowledge for the purpose of creating value.

- Set-up meetings or give new hire a list of colleagues from other areas of campus that would be of value connecting with.
- Forward Institute/ Division/ Department meetings, project teams or working groups you want the new hire involved in.

☐ Create connection with campus communications

- ☐ Ensure your new hire is aware of the CU Boulder Today.
    - This daily campus newsletter includes important leadership messages, activities, professional development, campus news and achievements.
- ☐ Ensure new hire is connected to your college, school, institute, division, or department communications.
- ☐ Encourage your new hire to connect with additional campus communications of interested.
    - [Office of Diversity, Equity and Community Engagement Newsletter](#)
    - [Innovation and Entrepreneurship Email List](#)
    - [Outreach and Engagement Newsletter](#)
    - [Center for Teaching & Learning](#)
    - [Volunteer Resource Center](#)

☐ Encourage campus involvement

- ☐ Diversity & Inclusion
    - [IDEA Council](#) : The IDEA Council is a representative body comprised of student, staff and faculty charged with prioritizing the recommendations in the IDEA Plan.
    - [Diversity & Inclusion Summit](#) : The goal is to provide a foundation to help us build community resilience, foster mutual respect, and promote empowerment, visibility, validation and unity among students, faculty, and staff.
    - [Office of Diversity, Equity & Community Engagement](#): This office fosters CU Boulder's vision for a diverse campus climate and works with students, faculty, and staff to implement the campus diversity plan.
    - [Diversity Learning & Development](#) - Department of Human Resources courses and resources for faculty & staff. All free of charge to CU Boulder employees.
    - [Center for Inclusion & Social Change](#): At the Center for Inclusion and Social Change (Center), our goal is to support all students in the exploration of their identities and create a welcoming and inclusive space on campus that provides academic and personal growth.
- ☐ Campus Governance
    - [Staff Council](#): CU Boulder's Staff Council is a team of elected members from across the campus. We represent the interests of our campus' staff by advocating on a variety of issues, proposing policies, serving in an advisory role to administration, and facilitating a variety of events to bring collaborative opportunities to the campus.

- ▪ [Boulder Faculty Assembly](): The Boulder Faculty Assembly is the representative body of the faculty in the shared governance of the CU Boulder campus. A guiding principle of that shared governance, recognized by the Board of Regents of the University of Colorado, is that the faculty and the administration shall collaborate in major decisions affecting the welfare of the University.
- ☐ Campus Events worth mentioning
  - ▪ [Diversity & Inclusion Summit]()
  - ▪ [Conference on World Affairs]()
  - ▪ [Health & Wellness Summit]()
  - ▪ [CU on the Weekends]()

Excel

☐ Meet at 30/60/90 Days

- ☐ Have quick check in with your new hire. Questions you may consider asking:
  - ▪ How are things going in general?
  - ▪ Is there anything you don't understand or need clarification on for you position?
  - ▪ Are there any challenges you have encountered that we can work through together?
  - ▪ Are you feeling connected with your team?

☐ Have a coaching session at six months

- ☐ Performance plan progress.
- ☐ Realign any expectations, if applicable.
- ☐ Considering asking:
  - ▪ Are there skills/competencies you want to develop or improve?
  - ▪ What would you like to accomplish in the next 6 months?
  - ▪ Are there any challenges you have encountered that we can work through together?
  - ▪ Are you feeling connected with your team?
- ☐ Recommend [professional development opportunities]() that align with goals.

Adapted from: Stein, M., & Christiansen, L. (2010). Successful Onboarding: Strategies to Unlock Hidden Value Within Your Organization (1st ed.). McGraw-Hill Education. | Society for Human Resources Mgmt., & Bauer, T. (2010). Onboarding New Employees: Maximizing Success. | Harpelund, C. (2019). Onboarding: Getting New Hires off to a Flying Start. Emerald Publishing Limited.