Supervisor Toolkit

Onboarding Remote Employees

Human Resources

UNIVERSITY OF COLORADO **BOULDER**

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Why Onboard?

The Importance of Onboarding

Onboarding is often overlooked as part of a new hire's journey or limited to the processes and paperwork it takes to get a new employee set up in the system. There is compelling data that encourages CU to focus on a robust and continual onboarding process for our new employees as it corresponds to retention.

- Organizations with strong onboarding processes increase new hire retention by 82% and improve the productivity by 70%.
- Employees who attend a structured orientation program are 69% more likely to remain at the company for at least three years.
- 17% of employees leave their new job between the first week and the third month of a new job.

Onboarding Module at CU

Onboarding is the process of getting new employees to higher levels of productivity, faster. It spans over the first 12 months. CU's Onboarding module includes four phases: activate, clarify, connect, and excel. These are overlapping principles that guide our onboarding process supported by prior onboarding research.

- **Activate:** Performing set-up tasks to ensure payroll, benefits, logistics, schedule, and technology needs are met.
- **Clarify:** Orientation to unit and organization. Developing 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.

Challenges of Onboarding Hybrid/In-Person

Post-pandemic, we are all aware of the challenges of building community among our teams, and this can be particularly true if your employees are hybrid and not everyone sees each other on the same day. Some important tips to remember if your employee is hybrid are:

- Provide a go-to person for your new hire to ask questions of outside of their supervisor
- Create connection to the team and technology training before their first day to create a welcoming and seamless transition
- Ensure culture is explicitly explained particularly in remote vs. in-person realms

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Kolmar, C. (2022, February 13). 17 incredible onboarding statistics [2022]: HR trends in hiring, training, and retention. Zippia. Retrieved October 30, 2023, from https://www.zippia.com/advice/onboarding-statistics/

Stein, M., & Christiansen, L. (2010). Successful Onboarding: Strategies to Unlock Hidden Value Within Your Organization (1st ed.). McGraw-Hill Education.

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Roles of Onboarding

Onboarding Program Manager:

Works in central Human Resource and oversees onboarding for all research faculty, university staff, and classified staff that are new to CU Boulder. They help answer onboarding questions for new hires as well as supervisors, HRL's and Hiring Managers. They host programs like New Employee Welcome Experience (virtual and in-person), CU Discover, and QuickStart. They are available for individual consultations to grow your departmental onboarding program.

Contact: newatcu@colorado.edu

Supervisor/HRL/Hiring Manager:

Role will vary as different portions of this role may be shared amongst multiple individuals. Generally responsible for onboarding their new hire including preparing for their new hires first day, acclimating them during their first week/month and continued support throughout their first year. They may oversee a variety of duties including, getting technology/workspace set up, scheduling trainings, and ensuring new hire is completing their own new hire tasks.

New Employee:

Responsible for completing set-up/onboarding tasks assigned to them from a variety of different systems on campus from HR to Employee Services to their own department. They will need the most support during their first month, and slowly integrate into their new role during their first year.

Departmental Onboarding Manager:

Your department may have someone specifically in charge of Onboarding as a full or part-time role in lieu or in addition to the new hire's supervisor/HRL/Hiring Manager. This role would vary based on your department-specific needs.

Employee Services:

Employee Services oversees Payroll and Benefits at CU at the system level. If a new employee or supervisor has questions regarding these two items they should contact their office. They also host in-person Pay/Benefit Orientations almost every other Monday in the afternoon in ARC 346 and video orientations on their website.

Payroll: payroll@cu.edu, 303-860-4200, opt. 2
Benefits: benefits@cu.edu, 303-860-4200, option 3

Colleagues/Buddy:

Your department may have implemented a Buddy Program or heavily rely on your new hire's colleagues during the initial onboarding process. This individual(s) may provide community and knowledge to your new hire outside of the supervisor, greatly enhancing the onboarding experience and allowing the new hire to immediately feel connected to their team.

Before the First Day

Goal
Supervisor: Be comfortable and prepared for your new hire's first day/week
New Hire: Feel welcomed to the team and confident coming into their first day

Technology

☐ Arrange any technological tools pickup/set-up as far in advance as possible. This may include a laptop, docking station, camera, headphones etc.

> 💡 **TIP:** It can be good to communicate with your new hire what sort of technology they already have and what they will need/prefer to use through work

☐ Schedule set-up time with IT support if applicable

☐ Ensure new hire know how to access: Email, Zoom, VPN, Microsoft Teams, Additional platforms your team uses new hire may need on or before their first day

Connection

☐ Introduce your new hire to your team via email and share when they will be joining the unit

☐ Create an itinerary for the first week(s): First Week Itinerary Template--Hybrid/In-Person
The Onboarding Program Manager is available to meet with the supervisor/hiring manager to develop a strong first week(s) itinerary based on your departments needs.

☐ If your new hire is benefits eligible, schedule a time for QuickStart on Outlook calendar within new hire's first two weeks. Zoom link: **https://cuboulder.zoom.us/j/96319715870**
QuickStart is offered most Mondays from 9:00-10:30 AM and covers tasks for new hire's including, but not limited to I-9, Direct Deposit, Enrolling in Benefits etc.

☐ Send welcome email to new hire from supervisor/unit: New Hire Welcome Email Template

> 👍 **WE RECOMMEND:**
> Items to include in your Welcome Email
> - First Week Itinerary
> - What to expect their first day/week
> - How to get to campus/where to park/where to arrive
> - Start and end times during their first day/week
> - Who will be meeting them in the office
> - Dress norms
> - Best way to contact someone that first day

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Administrative

- [ ] Create a Training Checklist: Training Checklist Template
- [ ] Order a nametag/business cards if applicable

What is your New Hire doing?

While you are preparing for your new hire's first day, your new hire is also completing their own pre-start checklist.

The items they should be completing are:
1. I-9 Section 1
2. Activating their identikey
3. Accessing their CU email account
4. Working with the Buff OneCard office to have their card ready for pickup

The First Day (in-person)

Goal

Supervisor: Ensure new hire feels welcomed and comfortable and has a strong agenda for the day

New Hire: Begin learning about their new workplace both physically and technologically, meeting other coworkers, and completing small tasks

Technology

- [ ] Have IT liaison help new hire log in/get access to their work computer if this has not already occured
- [ ] Set aside time to ensure an understanding of the technology/platforms your team uses as well as adding them to necessary shared folders: Zoom, Teams, Sharepoint etc.

TIP: Get your new hire added to teams if they are not already to welcome them to the team

Connection

- [ ] Go over agenda for the day/week
- [ ] Have a Day One Meeting with your new hire

WE RECOMMEND:
Your first 1:1 you should discuss:

- Parking & Transportation
- Establishing expectations
- Work hours/schedule/lunch
- Asking for time off (sick/vacation)

- Best way(s) to communicate with you/the team
- Dress code
- Workplace norms/behaviors
- Virtual meetings expectations

- [ ] Have yourself or a team member assigned to guide your new employee throughout the day for any questions/support when moving through the agenda
- [ ] Begin meeting with coworkers virtually via 1:1/teams introductions etc.

The First Week

Goal

Supervisor: Continue to integrate your new hire into the culture of your workplace and allowing them to navigate unscheduled worktime

New Hire: Continue building confidence in their new role as well as excitement about trainings for their position

Connection

- ☐ Take out team and new hire to lunch/brunch etc.
- ☐ Style and Culture Meeting with supervisor

  This conversation should focus on the culture of your department including unspoken "rules" that will help your new hire thrive

- ☐ Roles and Responsibilities Meeting with supervisor

  This conversation should focus on why did you hire them what are you expecting of them

- ☐ Have a check-in meeting with your new hire at least three times during their first week

Environmental

- ☐ Department/Unit Orientation

  The Onboarding Program Manager is available to meet with the supervisor/hiring manager to develop a departmental/unit orientation.

WE RECOMMEND:

Departmental Orientation may include:
- Organizational Charts
- Mission/Goal and how it fits into CU's larger goals
- Typical work week
- Introduction to other colleagues
- Understand why their role is important to the greater whole
- Networking exercises
- History
- An introduction to upline leadership
- Diversity & Inclusion Initiatives

Administrative

- ☐ Update any directory information on websites/bulletins etc. regarding your new hire
- ☐ Get new hire added to team/department, recurring meetings
- ☐ Ensure new hire is getting all paperwork done in MyCUInfo portal including tax forms, employment forms, and time tracking system specific to their role.

  If you are onboarding a supervisor, train them on how to approve timesheets
- ☐ Get new hire added to appropriate listservs
- ☐ Ensure new hire knows how to request their Buff OneCard. If your new employee attended QuickStart, they will be aware of how to request their Buff OneCard via mail or in-person.

  New Hire needs to include their address when requesting their Buff OneCard
- ☐ Ensure new hire knows to complete their I-9 Section 2. If your new employee attended QuickStart, they will be aware this needs to be completed **within 3 days of their start date** and the appropriate documentation to bring.

  New hire needs to fill out this form if they will not be coming in-person to complete:
  https://www.colorado.edu/hr/content/remote-i-9-assistance

The First Month

Goal

Supervisor: Continue to train your new employee on their specific, while supporting them with less frequent check-ins

New Hire: Continue to feel comfortable in their role and begin working independently without as much support from colleagues/supervisor

Connection

- [ ] Continue to meet for 1:1 once a week or every other week and who is best to go to with supervisor is not present
- [ ] Have 1:1 meetings set up with the rest of the team/individuals the new hire will frequently work with; these could be casual coffee chats or more related to work based on your new hire's needs
- [ ] 30-Day Check-in

  The Onboarding Program Manager is available to meet with the supervisor/hiring manager to develop what this may look like for your new hire
- [ ] Discuss CU's Performance Planning and Review
- [ ] Department/Division level orientation/trainings and team building activities

Environmental

- [ ] Schedule time to attend campus-wide onboarding programs

  - [ ] **New Employee Welcome Experience:** This all-day tour of Main and East campus connects new hires and shares the story of how CU Boulder became the institution it is today. This is ideally scheduled within a new hires first two months. There are in-person and virtual options.
  - [ ] **CU Discover:** Held monthly/bimonthly, these 1-hour virtual sessions present an opportunity to learn more about working in Higher Education and at CU Boulder.

Administrative

- [ ] Ensure new hire completes CU Boulder's two mandatory trainings:
  - [ ] Discrimination & Sexual Misconduct Training
  - [ ] Information Security and Privacy Awareness
- [ ] Ensure new hire is completing access-based trainings
- [ ] Encourage new hire to enroll in their Benefits/Attend a Benefits Orientation within the first 31 days of their start date

  In-Person Orientation: Generally offered every other week in the Administrative & Research Center (ARC) 3rd floor from 2:30-4:00 PM MST.

  Video Orientation: Available online in Spanish and English

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Beyond the First Month

Goal
Supervisor: Continue to connect with your new hire throughout their first year to support them in their growth

New Hire: Gain deeper knowledge about their role and how to make it their own, learn more about campus resources, and feel supported to continue past the first year

Connection

☐ Connect your new hire to campus resources:

- CUBT
- Ombuds
- Office of Victim Assistance (OVA)
- Faculty & Staff Assistance Program (FSAP)
- Health & Wellness
- Volunteer Resource Center
- Inclusion, Diversity and Excellence in Academics (IDEA Plan)
- Shared Governance:
  - Boulder Faculty Assembly
  - Staff Council

☐ Have a 60 and 90 day check-in
☐ Have a six month coaching 1:1
☐ One Year STAY Interview with new employee
☐ Encourage new hire to attend professional development trainings that align with goals

Administrative

Travel and Purchasing

☐ Travel policies and procedures
☐ University credit card policies
☐ University travel services
☐ Expense report procedures
☐ Campus Policies website
☐ College, School, Institute or Department policies

Communications

The following are the communications a new hire is receiving before their first day with links to the email. Communications come from multiple offices and the order of communications may alter slightly. Most emails in the chart are sent to the new hire, but rows highlighted in gray are sent to the supervisor/hiring manager/HR liaison.

Sequence Order	Email	From	Office
1	[Background Check Request](#)	HireRight Customer Support noreply@hireright.com	HR
2	[Background Check Confirmation](#)	HireRight Customer Support noreply@hireright.com	HR
3	[Background Check Authorization](#)	HireRight Customer Support noreply@hireright.com	HR
4	[Offer Letter](#)	CU Boulder Jobs no-reply@colorado Includes recruitment coordinator email	HR
5	Date of Birth and SSN (if needed)	CU Boulder Jobs no-reply@colorado Includes recruitment coordinator email	HR
6	Degree Verification (if needed, individualized email)	Recruiting Coordinator	HR
7	Onboarding Your New Employee	newatcu@colorado.edu	HR
8	Welcome to CU	newatcu@colorado.edu	HR

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Sequence Order	Email	From	Office
9	Hire Confirmation	Recruiting Coordinator	HR
10	OIT Welcome	oithelp@colorado.edu	OIT
11	I-9 Section 1 Request	HireRight Customer Support noreply@hireright.com	HR
12	Benefits Welcome	benefits@cu.edu	Employee Services
13	QuickStart Followup	newatcu@colorado.edu	HR
14	Benefits Orientation Invitation	benefits@cu.edu	Employee Services