



INTERVIEWER'S TOOLKIT

Onboarding

Version 5.6

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Onboarding

In this module, we will discuss what onboarding is, why onboarding is important, and elements of an effective onboarding program.

What is onboarding?

Onboarding is the process of integrating recently hired employees into the organization as well as reaffirming their employment decision. It involves orienting new employees so that they can most efficiently learn the knowledge, skills, and behaviors needed to succeed in their new organization. This includes learning how to perform the work itself, establishing relationships with coworkers and other organizational members, understanding the language (e.g., acronyms, jargon, technical terms) that is unique to the organization, understanding the values and goals of the organization, and learning the organization's history and culture. It often takes six months to a year for an employee to be fully integrated into the organization.

Why is onboarding important?

Having an effective onboarding program is important for five reasons:

1. *High cost of turnover for newly hired employees.* Turnover is expensive no matter how long an employee has been working, but it is particularly costly for newly hired employees. Organizations typically invest considerable resources in recruiting, selecting, and training new employees. In addition, newly hired employees are typically less productive than experienced employees. Effective onboarding has been shown to increase retention and reduce costly turnover among new employees.
2. *Reduce new-hire time to productivity.* One of the biggest challenges newly hired employees face is “getting up to speed” in their new job. This occurs, in part, because new employees often spend too much time navigating an unfamiliar organizational environment. Effective onboarding can help new hires become productive more quickly.
3. *Positive long-term impact on employee attitudes and behaviors.* Effective onboarding programs can help clarify an employee's role in the organization, increase self-confidence at being effective in that role, and help integrate them into the social network. When these things occur, performance, job satisfaction, and organizational commitment will be high.
4. *Transmission of organizational values and culture.* Onboarding programs can transmit important organizational goals and values and provide an introduction to an organization's culture. When done effectively, new employees will more quickly understand and internalize the organization's key values and culture.

5. *Effectively dealing with a multi-generational workforce.* One of the challenges in today's workplace is the potential presence of employees from four different generations. This includes the "Silent Generation" (born 1922-1944), "Baby Boomers" (born 1945-1964), "Generation Xers" (born 1965-1980), and "Millennials" (born after 1980). Challenges arise because these different generations have different outlooks on life, different work ethics, different views of leadership, and different ways of relating to others (see Worksheet #1 for details about how the generations differ). Onboarding programs can help communicate these differences and offer strategies for how to effectively work with coworkers from different generations.

Elements of an Effective Onboarding Program

To understand the components of an effective onboarding program, it is first helpful to understand the stages a new hire experiences:

1. *Anticipation.* This occurs before new employees join the organization. Through interactions with organizational members (e.g., recruiters, interviewers, managers) and recruitment and selection procedures (e.g., job fairs, employment tests) new employees develop expectations about the organization before they start work. These expectations may be accurate but they may also be inaccurate.
2. *Entry.* When new employees begin work, they learn about their new jobs and typically receive some form of training. They also learn about their coworkers and supervisors and are initiated into a broader social network. This is the stage where new employees learn how accurate their organizational expectations were.
3. *Settling in.* In the settling in stage, new employees have begun to better understand the realities of their jobs, the social environment within which they are working, and how things work at the organization. They begin to think about how the organization is evaluating their performance, the extent to which there are career opportunities at the organization, and the fit between their job and their non-work interests and obligations.

With these stages identified, we can describe some of the concrete things that can be done to effectively onboard employees. These are formatted in the form of "checklists" to help you remember to do it.

Pre-Arrival Checklist for New Hires

This checklist provides direct managers with the steps that should be taken prior to each new employee's first day.

- Confirm & contact HR with new hire's start date
- Verify the following tasks have been completed by HR:
 - Set schedule for new hire's hospital orientation
 - Removed job posting
 - Verified new hire's licensure and certification (if applicable)
 - Verify all required forms have been completed
 - Information about benefits enrollment, important departmental/organizational policies and procedures have been sent
- Mail welcome letter to new hire's home one to two weeks prior to start date
- Contact Education if new employee is a manager to schedule specific manager orientation
- Call new hire one week prior to start date
 - Congratulate new hire and welcome them to the team
 - Provide an overview of the first week on the job (schedule, tasks, uniform, etc.)
 - Provide a contact for additional questions/issues that arise prior to start date
- Assign staff preceptor/orientor/buddy
- Arrange for computer access and voicemail account (if applicable)
- Add new employee to unit/department organizational chart and telephone/email directory
- Announce new hire's position and scheduled start date to unit/department staff, either at staff meeting or via email
- Prepare new hire's workspace (if applicable)
 - Clean work area
 - Order/install phone
 - Order/install computer
 - Confirm employee's telephone extension is working and correct
 - Assign departmental mailbox
 - Order supplies, business cards, etc.
 - Arrange for keys
- Draft unit/department onboarding schedule
- Prepare unit/department welcome packet for first day:
 - Copy of job description
 - Department tour
 - Orientation checklist
 - Department customer service expectations (e.g., appropriate way to answer the phone)
 - Time clock instructions
 - Policies needed immediately (e.g., time & attendance, breaks, dress code, etc.)
 - Fire safety
 - Infection control
 - Welcome note from the unit/department
 - Department mission and goals
 - List of current department projects and related materials
 - Department staff work schedule and scheduling procedures
 - Calendar of unit/department meetings and events
 - Department phone and email directory
 - Phone and email directory of primary contacts in other units/departments
 - List of who to contact for help with specific challenges
 - Department map
- Arrange for unit/department first day welcome gestures (e.g., welcome sign on new hire's work station, snack/luncheon welcoming new hire to unit/department, etc.)

First Week Checklist

Once a new employee starts, it is important for the immediate supervisor to welcome them to the organization. If the immediate supervisor is unavailable, a high performing coworker with a positive attitude should be engaged to welcome the new employee. This orientation could include:

- Formal introductions to co-workers and management.
- Tour of work area/department.
- Review of departmental policies and procedures.
- Discussion of organizational values and norms.
- Discussion of any other organization or department specific language (e.g., potentially unfamiliar terms or acronyms) or procedures.
- A one-on-one meeting with the supervisor to discuss the job performance, expectations, goals and to answer any other questions the new employee might have. See Worksheet #2 for a sample meeting form.

30, 60, 90-Day Checklist

Once an employee has been on the job for a little while, it is important to ensure that several other activities occur:

- If formal training is required, ensure that the employee is scheduled for and attends all required training.
- If informal training is required, ensure that the employee is teamed up with a knowledgeable employee with a positive attitude for on-the-job training.
- Supervisors or managers should schedule regular, formal meetings with the new employee, even if it's just to catch up on how the new employee is doing. At a minimum, these meetings should be at 30, 60, and 90 days. Ideally, the meetings could be every week or two. These meetings can serve to answer employee questions, communicate how well the employee is adjusting and performing, and to revisit organizational expectations and goals. See Worksheet #3 for a sample meeting form.
- Periodically survey newly hired employees to determine how well your onboarding activities have worked as well as how well your employees have been adjusting to their new roles. See Worksheet #4 for sample survey items.

Six Months - One Year Checklist

Once an employee is past the “entry” stage and is in the “settling in” stage, they are interested in understanding how they are doing, the range of career opportunities available at the organization, and managing potential conflicts with their non-work life. The components of an onboarding program should thus change to reflect these new concerns:

- Conduct formal performance appraisals at six months and one year. This would provide an opportunity to review performance, provide feedback, understand employee concerns, and set goals. It is also an opportunity to get feedback from the employee about any concerns they may have and to help them problem-solve if they are encountering any work or non-work related difficulties.
- Determine and discuss if there are any professional development opportunities the employee is interested in.

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Worksheet #1

Differences Between the Generations

Generation	Values/Characteristics
Silent Generation (born 1922 - 1944)	<ul style="list-style-type: none"> • Dedicated • Willing to sacrifice • Hard working • Respect for authority • Honor • Conformer • Past-oriented • Optimistic
Baby Boomer (born 1945 - 1964)	<ul style="list-style-type: none"> • Idealistic • High expectations • Optimistic • Personal growth • Driven • Family-oriented
Generation X (born 1965 - 1980)	<ul style="list-style-type: none"> • Diversity • Informal • Skeptical • Not intimidated by authority • Self-reliant • Risk-taking • Group-oriented • Technically savvy
Millennials (born after 1980)	<ul style="list-style-type: none"> • Confident • Optimistic • Diversity • Achievement oriented • Quick learners • Group-oriented • Technically savvy

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Worksheet #2

First Week Meeting Form

Note: This form is intended to be used by supervisors in order to have a structured and systematic discussion with newly hired employees. To be most effective, supervisors should read through this form and prepare as needed. Space is provided for you to take notes (both on what you want to discuss as well as on the employee's questions).

Current Date:	Hire Date:
Name:	Department:
Job Title:	Supervisor:

Question/Issue	Notes
1. Provide a brief overview of the job responsibilities.	
2. Do you have any questions about these responsibilities?	
3. What are your expectations about this job?	
4. Communicate your expectations to the employee.	
5. Do you have any questions about these expectations?	
6. Describe your goals for this employee.	
7. Do you have any questions about these goals?	

Additional Comments/Questions:

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Worksheet #3

30, 60, 90-Day Meeting Form

30-Day Meeting	60-Day Meeting	90-Day Meeting
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Current Date:	Hire Date:
Name:	Department:
Job Title:	Supervisor:

Question/Issue	Notes
1. Have we met your expectations for this job?	
2. What's been going well on the job?	
3. What's been challenging/frustrating about the job?	
4. Do you have all the necessary equipment to perform your job?	
5. Are there any areas where additional training would be beneficial for you?	
6. If you could change one aspect of your experience on the job so far, what would it be?	
7. Are there any aspects of your job performance where you would like additional feedback?	
8. How can I help you in your job?	

Additional Comments/Questions:

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Worksheet #4

We are very interested in your thoughts about your transition into your new role with us. In particular, we'd like to know what we did that you found to be helpful in adjusting to your new role as well as what we could improve. Please respond candidly and honestly when making your ratings (the survey is anonymous to ensure candid responses). There are no right or wrong answers, please simply let us know how we're doing. Thanks for your help.

Question/Issue	Rating Scale (CHECK ONE)		
	YES	NO	CANNOT RECALL
1. Were you sent information about your new job?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Were you sent information about your new department?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Were you sent information about the organization?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Were you formally introduced to your co-workers?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
5. Were you formally introduced to supervisors/managers in your department?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
6. Were you given a tour of the work area/department?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
7. Were you given a review of departmental policies and procedures?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
8. Did you receive on-the-job training?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
9. Did you receive an explanation of departmental procedures?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
10. Were you given a formal coach or mentor?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
11. Did you meet with your supervisor within the first week to discuss their expectations?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
12. Have you met with your supervisor to discuss your performance level?	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Question/Issue	Rating Scale (CHECK ONE)				
	Strongly Disagree	Disagree	Neither Agree or Disagree	Agree	Strongly Agree
1. I felt welcomed to the department.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. I felt welcomed to the organization.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. All necessary paperwork was completed efficiently.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. I obtained the training needed prior to beginning my job.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. I obtained the materials needed to perform my job.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. My supervisor is available to answer questions that I have.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Question/Issue	Notes
1. What did you find to be helpful in adjusting to your new job?	
2. What can we do to improve our onboarding process (i.e., all the things that we do to try to get you "up to speed" in your new job)?	
3. What other comments do you have?	