



Onboarding Templates

Your Guide to Retaining Your New Employees

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Onboarding New Employees to Hopkins: Onboarding Templates

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Employee Cover Sheet

Unit: _____

Name: _____

Hire Date: _____

By the End of...	Completion Date	Initials / Name
Hospital Orientation: The First 2 Days		
Week 1		
Week 2		
Week 3		
Week 4		
Month 2		
Month 3		
Month 4		
Month 5		
Month 6		
Month 7		
Month 8		
Month 9		
Month 10		
Month 11		
Month 12		

Pre-Hire Checklist

Objective: Begin developing a relationship with a new staff member

Need	Activity
Career Services Sends to New Employee	<input type="checkbox"/> Pre-hire packet with general information: <ul style="list-style-type: none"> - Directions - Hours - Dress code for orientation and department - Departmental orientation plan - Parking arrangements - Emergency phone number to use during 1st week of orientation - Confirm salary and hours
Call New Employee	<input type="checkbox"/> Welcome, confirm arrival, answer questions <input type="checkbox"/> Address above issues, if not sent to employee <input type="checkbox"/> “Have you completed pre-hire activities such as physical and screening?” <input type="checkbox"/> Remind them of the Onboarding activities that must be completed prior to attending orientation <input type="checkbox"/> “Have you made housing arrangements?” (if coming from out-of-state) <input type="checkbox"/> “Do you have any questions about your orientation?” <input type="checkbox"/> Review schedule and send via email or regular mail <input type="checkbox"/> “We look forward to you joining our team!”

TIP: Part of creating the right expectation for new staff members is showing them that you are organized and preparing for their successful entry to the organization. It sends the message that they are important and valued, and that you are excited to have them join the team.

Getting Started: Pre-Hire to Start Date

Objective: Prepare the department for the arrival of a new staff member

Need	Activity
Space Prep	<input type="checkbox"/> Clean the employee's office or work area <input type="checkbox"/> Provide supplies (stapler, paper clips, paper, pens, etc) <input type="checkbox"/> Assign locker (as appropriate) <input type="checkbox"/> Obtain appropriate keys <input type="checkbox"/> Obtain signage/name plate (as appropriate)
Staff Prep	<input type="checkbox"/> Plan welcome event <input type="checkbox"/> Inform staff and key clients of employee's arrival date <input type="checkbox"/> Identify a buddy for this employee <input type="checkbox"/> Arrange for lunch on 1 st day with a staff member
New Employee Prep	<input type="checkbox"/> Set-up an E-mail account (Call the department's JHED Administrator); cannot be activated until after JHMCIS has received new hire paperwork on the Wednesday following orientation) <input type="checkbox"/> Set-up a telephone and voice mail account (Call Telecomm at x5-7994) <input type="checkbox"/> Obtain a pager (as appropriate) <input type="checkbox"/> Prepare to order business cards (if appropriate) – name, title, phone, office, fax, E-mail address, pager <input type="checkbox"/> Complete orientation schedule <input type="checkbox"/> Schedule outside training (e.g., E-mail, SAP, etc.) and department training

Department Orientation: End of Week 1

Objective: Reduce new employee anxiety

Assessing Week 1: Questions to Ask New Hire	
<ol style="list-style-type: none"> 1. Did everything go well with pre-hire paperwork and appointments? 2. How did Day 1, Day 2 and Day 3 on the job go? 3. Was someone able to answer your questions? 4. Do you have concerns about anything so far? 5. Were you introduced to the team and internal and external customers? 6. What do you need from me? 7. What worked/didn't work during your first week? 8. What was the most challenging thing you've had to deal with this week? 9. Do you feel welcomed? 10. Is there anything that you feel deserves more explanation? 11. Do you have any follow-up questions from New Employee Orientation (e.g., parking, benefits)? 	
Topics to Review & Discuss:	
<p>Safety and Health Requirements</p> <ul style="list-style-type: none"> <input type="checkbox"/> Show employee where policy manuals/information are kept. <input type="checkbox"/> Discuss safety policies and practices. <input type="checkbox"/> Register employee for training. <input type="checkbox"/> Show where all alarms, hydrants and other safety equipment are located. <p>Office Procedures, Equipment, Supplies</p> <ul style="list-style-type: none"> <input type="checkbox"/> Explain office procedures for mail, ordering supplies, purchasing. <input type="checkbox"/> Demonstrate operation of telephones, computers, printers , faxes. <input type="checkbox"/> Show where supplies & other equipment are kept. <input type="checkbox"/> Set up training / access for email, applicable systems training, applicable computer classes. <p>Specific Job Requirements</p> <ul style="list-style-type: none"> <input type="checkbox"/> Job description and functions <input type="checkbox"/> Job responsibilities <input type="checkbox"/> Job performance expectations <input type="checkbox"/> Who are their customers; how do their work outcomes affect others areas <input type="checkbox"/> Customer Service Standards <input type="checkbox"/> Other: _____ 	
Employee Issues:	Your Follow-up:

Department Orientation: Week 2

Objective: Strengthen bond between new staff member and organization

Assessing Week 2	
<ol style="list-style-type: none"> 1. What part of your job do you find most rewarding? Most successful? 2. Does this job meet you initial expectations? Why or why not? 3. Do you feel like you've developed the knowledge and skills to do your job? 4. Do you need more training on any of your job tasks? 5. Are you feeling supported by your team? 6. Are they communicating with you? 7. What has been the most challenging part of this job? 8. What would make the onboarding process better? 	
Topics to Review & Discuss:	
<p>Unit Background</p> <ul style="list-style-type: none"> <input type="checkbox"/> Unit history <input type="checkbox"/> Unit mission and vision * (If you need help creating a mission and vision, use link below) <input type="checkbox"/> Unit values <input type="checkbox"/> Unit goals <input type="checkbox"/> Supervisor's management style <p>General Performance Expectations</p> <ul style="list-style-type: none"> <input type="checkbox"/> Expected levels of productivity <input type="checkbox"/> Expected work habits and ethics <input type="checkbox"/> Equitable treatment <input type="checkbox"/> Professional development and career opportunities <p>Behavioral and Cultural Expectations</p> <ul style="list-style-type: none"> <input type="checkbox"/> Distribute and review unit norms, codes of conduct and values <input type="checkbox"/> Discuss unit culture 	
Employee Issues:	Your Follow-up:

Department Orientation: Week 3

Objective: Strengthen bond between new staff member and organization

Assessing Week 3	
<ol style="list-style-type: none"> 1. What part of your job do you find most rewarding? Most successful? 2. Does this job meet you initial expectations? 3. Do you feel like you've developed the knowledge and skills to do your job? 4. Do you need more training on any of your job tasks? 5. Are you feeling supported by your team? 6. Are they communicating with you? 7. What has been the most challenging part of this job? 8. What would make the onboarding process better? 9. Provide feedback on any issues from last week. 	
Topics to Review & Discuss:	
<p>Policies</p> <ul style="list-style-type: none"> <input type="checkbox"/> Show where policies are kept <input type="checkbox"/> Discuss and review: <ul style="list-style-type: none"> ○ Performance appraisal process ○ Time and attendance ○ PTO and holidays ○ Scheduling ○ Inclement weather ○ Breaks and lunch ○ Jury duty ○ Security ○ Other: _____ 	
Employee Issues:	Your Follow-up:

Department Orientation: Week 4

Objective: Strengthen bond between new staff member and organization

Assessing Week 4	
<ol style="list-style-type: none"> 1. What part of your job do you find most rewarding? Most successful? 2. Does this job meet you initial expectations? 3. Do you feel like you've developed the knowledge and skills to do your job? 4. Do you need more training on any of your job tasks? 5. Are you feeling supported by your team? 6. Are they communicating with you? 7. What has been the most challenging part of this job? 8. What would make the onboarding process better? 9. Provide feedback on any issues from last week. 	
Topics to Review & Discuss:	
<p>Unit Business</p> <ul style="list-style-type: none"> <input type="checkbox"/> Nature of the business <input type="checkbox"/> Distribute unit /area and department organizational charts <input type="checkbox"/> Profile of customer, patients and clients <input type="checkbox"/> Review unit /area and department structures and reporting relationships <input type="checkbox"/> Facilities <input type="checkbox"/> Functions of other related areas <input type="checkbox"/> Services offered <input type="checkbox"/> Financial background and implications <input type="checkbox"/> Measures of effectiveness: profit/loss; patient satisfaction; employee engagement <input type="checkbox"/> Conduct a tour of the facility 	
Employee Issues:	Your Follow-up:

Proving Competence: Month 2

Objective: Identify any early transition issues

It's important to develop a clear progression of increased responsibilities. Make sure you talk about job productivity expectations and increasing independence.

This is often a critical time for the buddy/mentor/preceptor to be involved with the new staff member. As independence increases, more questions come up about the job. Often the informal teacher is the one that the new staff member feels most comfortable going to with their questions. Make sure this relationship remains strong.

Assessing Month 2
<ol style="list-style-type: none"> 1. Is your buddy/mentor/preceptor/trainer meeting your needs? 2. Are we delivering on what we promised? What are we delivering on? What are we not delivering on? 3. What satisfies you in your work? What gets in your way? 4. What are the areas identified with your buddy/mentor/preceptor that you are working on? 5. What kind of support or direction do you need from me that you aren't getting? What are you getting that you don't want? 6. Follow up on any issues from last month.
<p>Employee Issues:</p>
<p>Your Follow-up:</p>

