Welcome to The Ohio State University

Manager Checklist

Onboarding New Remote Employees

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THE OHIO STATE UNIVERSITY
HUMAN RESOURCES

Manager Checklist for Virtual Onboarding

This document provides managers and supervisors with a checklist, guidance and resources for onboarding new employees who will telework from the start.

Starting a new job can be an exciting time, filled with anticipation and anxiety. During times of crisis, the balance of anticipation and anxiety may invert for a new employee. It is the manager's responsibility to help the new employee become familiar with their new role and be productive. Whatever your leadership style, leaning toward **compassion** (for yourself and your new employee) and **over-communication** is helpful.

NOTE: The hiring and onboarding process has been modified during the university state of emergency, so please utilize the information below prior to your new employee's start date. Please keep in mind the many processes including I-9 and background check completion have changed.

Warm Welcome

- ☐ **Obtain technology resources** for new telework employees.
    - o If the college or unit **is a Managed IT Services (MITS) Customer**, utilize Service Now to set-up a new employee's computer. The hiring manager will call the IT Service Desk at 614-688-4357 to schedule curbside pickup of the computer. A remote meeting will then be scheduled to help the new employee get started.
    - o If the college or unit uses an internal IT team, please contact your local IT department.
- ☐ **BuckID is operating by appointment only** in a temporary location in Lincoln Tower to meet the needs of essential personnel / new hires. New employees needing an ID can contact BuckID at buckidcardservies@osu.edu or 614-292-0400 to schedule an appointment. Information on the location of its temporary office will be provided when the appointment is scheduled. BuckID will continue to adjust hours to meet the needs of the university.
- ☐ **Communicate with your new employee** before their start date, so they know what to do, how to obtain the appropriate technology, and that you care.
    - o Welcome video call (preferred), phone call or email.
    - o Convey your excitement for their start.
    - o Create an agenda for their first day and first week.
    - o Make sure they have your phone number and email.
- ☐ **1st Day** Provide a virtual welcome to your new employee and overview the agenda for the first day. The Virtual Meeting Buckeye Learning Burst at gatewaytolearning.osu.edu includes brief resources to help you collaborate effectively from multiple locations.

- ☐ **Accessibility accommodations for telework** It's important to realize not all employees will have the same telework circumstances. When shifting to a telework environment, check with your employees to determine if they need additional resources or accommodations for accessibility. If you need assistance addressing any accessibility needs, please contact The Office of Human Resources, Integrated Absence Management and Vocational Services Department (IAMVS) at 614-292-3439 or hr-integrateddisability@osu.edu. In parallel, recognize the need to make PowerPoints and other materials electronically accessible. One easy way to ensure accessibility within office tools is to leave the accessibility checker open as you are creating documents and PowerPoints. These small steps make a big difference when creating inclusivity remotely.
- ☐ **Make it personal.** Especially important in times of uncertainty, determine how you can make your new employee's experience excellent. Send a card in the mail, an email, or have a get-to-know-you phone call before or after they start their new role. This extra touchpoint communicates the value you place on their role.
- ☐ **Benefits and Preboarding** Connect with your HR Consultant to ensure you know what preboarding, training and benefits decisions the new employee needs to complete and the associated deadlines. Below is a list of the required onboarding trainings and tasks.

- ☐ Review the Benefits Overview & Watch videos

- ☐ Review University Policies https://policies.osu.edu/ (examples below)

  Work Environment

  - o Tobacco Free Ohio State
  - o Alcohol and Other Drugs
  - o Drug-Free Workplace
  - o Sexual Misconduct
  - o Affirmative Action, Equal Employment Opportunity & Non-Discrimination/Harassment
  - o Workplace Violence

  Technology and Information Security

  - o Responsible Use of University Computing and Network Resources
  - o Institutional Data

  Special Situations – Do these apply to you?

  - o Probationary Period (for CCS and bargaining unit staff)
  - o Activities and Programs with Minor Participants (for those who interact with minors)

- o [Privacy and Release of Student Education Records](#) 📕 (for those who handle student education records)
- o [Student Employment](#) 📕 (for student employees and those who supervise student employees)
- o [Intellectual Property](#) 📕 (for those who create intellectual property)

☐ **Review and Complete Required Trainings** via [BuckeyeLearn](#):

- o [Introduction to BuckeyeLearn](#) (helpful)
- o [Report = Support: Identifying and Responding to Sexual Misconduct](#) (required and automatically assigned)
- o [Understanding the Sexual Misconduct Policy](#) (required and automatically assigned)

Please Note: As a manager, please confirm and assign any additional trainings that may be required or necessary for your unit and for the position.

People

☐ **Communicate the start date** of the new team member. Share more about the individual, the role they will assume and why you're excited about the work they will contribute.

☐ **Introduce your new employee to the team**. Send an email introduction and invite members to share what they do, and perhaps something unique about themselves.

☐ **Schedule a [video call](#)** with the team during the new employees first week. Encourage the team to schedule one-on-one video calls with the new employee.

☐ **Identify key partners and customers** (internal and external). Send email introductions and schedule calls with these individuals and the new employee as appropriate. Ask team members who will be frequent partners to reach out and schedule a call. Use the space below to create a list of people with whom the new employee should connect.

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☐ **Consider asking team members to help** with elements of the new employee's onboarding. For example, a project lead or process owner might best describe an important initiative that is underway.

Technology Help

- ☐ **Help your new employee get acquainted** with their technology/equipment.
- ☐ **Provide technology support contact information**. To contact the OCIO IT Service Desk offering 24-hour support, seven days a week,visit the self service page, email ServiceDesk@osu.edu, or call 614-688-4357 (HELP).
- ☐ **List specific technology contacts** and important support numbers below.

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Culture and Values

- ☐ **Share the cultural norms of your unit and team** with your new employee. Stories are often good ways to communicate what is normal. Topics to think about include email protocols, texting, phone and conference calls, communication styles and customs.
- ☐ **Introduce the university vision, mission and values** in the first two weeks of your new employee's role. This is also a great time to talk about the mission, or purpose, of your unit and your team.
- ☐ **Encourage the new employee to grow and learn** by visiting gatewaytolearning.osu.edu

Performance Expectations and Goals

- ☐ **Share the position description** with the new employee and clarify aspects of the job not well articulated in the description.
- ☐ **Communicate your expectations.** As the manager, it is your responsibility to clarify expectations of what work is done and how it is executed. Share your expectations for behavior, preferences for communication and how you define high performance. Encourage questions as clarity in the beginning assures delivery in the end.
- ☐ **Develop performance goals.** If performance goals are not already outlined for your new employee, now is the time to develop and communicate them. Schedule time to brainstorm and refine SMART Performance Goals/Objectives for your new employee.
- ☐ **Learn their strengths and areas for growth**. Take time to get to know your new employee. Ask what they see as their strengths and their areas of interest for professional growth. This is a great time to be curious and actively listen.
- ☐ **Outline the performance management process.** Clarify the timeline and rating scale for the new employee. If you have regular one-on-one meetings with employees, let them know the preferred cadence and basic agenda of those conversations.

Communication

- ☐ **Communicate often.** If you were in an office with someone, you would likely pass them in the hallway, stop into their office/cube, grab a cup of coffee together or even have lunch. There might be a team welcome. In the absence of physical presence, in situations where employees and managers telework, communication is critical.
- ☐ **Be flexible** and prepare to adapt to changing situations. Set-up a 10-15 minute phone call each morning or, a call every other day in the afternoon for the first couple of weeks. Text messages are good for some communication but, insufficient when a deeper or more nuanced conversation is necessary. Ask your employee what they need to be productive.
- ☐ **Early guidance makes a difference**. It is crucial that your new employee get off to the right start. In a telework situation, it is important to focus your new employees time on the right things, producing in a way that makes achieves organization objectives and helps them connect to the work. Your guidance in their first few weeks and months is critical to productivity and engagement.

Manage and Lead

- ☐ **Management and leadership are different**. Management is more about now – ensuring that processes are followed, and work is done to the standards of expectation. Leadership is more about the future – helping people adapt to change, buy-in to new ideas and work *toward* something. As your new employee gets up-to-speed, it is important to communicate and help them calibrate to changing situations and priorities.
- ☐ **Celebrate individuals**. Each team member is different. Each role has a different set of responsibilities. Attend to those differences and help your new employee feel valued. Treating everyone "the same" is more about fairness than sameness. Remain flexible to your new employee's needs, while communicating performance expectations while celebrating individual and team success.
- ☐ **Invest time in building a team**. In a telework scenario, feeling part of the team and understanding how to work together is a key responsibility of a manager. Make sure you are attending to the group dynamic and the needs of the team. The time, duration and frequency of team meetings should be driven by the work. Monitor the group dynamic and ensure your new employee is being integrated into the work and the team.

Resources

For tips on managing your employees, building relationships and creating positive team culture, please visit gatewaytolearning.osu.edu leadership development.

5 Important Lessons If You Move to Virtual Onboarding

Virtual Onboarding Introductions Form Good Connections

[6 Best Practices for Onboarding Remote Employees](#)

[How to Develop a Remote Employee Onboarding Process](#)

[Virtual Onboarding: A Closer Look](#)

HR Daily Advisor has a free webinar on virtual onboarding here -

https://hrdailyadvisor.blr.com/webcast/virtual-onboarding-new-hire-experience/

Additional Resources for Managers:

[Building Multigenerational Teams](#) (online course)