

Manager Employee Onboarding & Orientation Guide

Clinic Name

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# Manager’s Role in Onboarding

As a manager, you play a crucial role in the onboarding and orientation of your new employees. You are responsible for overseeing the process while collaborating and communicating with Clinical Nursing Education, your Human Resources Business Partner, and other relevant partners.

Onboarding isn’t just about preparing for Day 1; it involves planning for the entire first year to ensure long-term success. Therefore, it’s essential to plan comprehensively. The checklists provided are intended as a general guide. Be sure to collaborate with your leadership team, Clinical Nurse Educator, and Human Resources Business Partner to address any additional onboarding needs specific to your clinic or position.

Your role is vital in shaping a successful onboarding journey. Use the checklists as a starting point and adapt them as necessary to meet the unique needs of your clinic.

# Onboarding/Orientation Timeline:

## Manager - Pre-Hire Checklist

* Sign employee up for necessary accesses and training to systems and drives (i.e., Microsoft Office Suite (Outlook, Teams, etc.), clinic specific Shared Drive(s), Epic department views, Self-Serve Orientation checklists)
  + [Epic Account Request Form via Self-Serve](https://selfserve.upstate.edu/ais/applications/forms_manager/views/epic.cfm) *(complete 2-4 days before training)*
    - [Epic Department List](https://www.upstate.edu/imt/intra/pdf/helpdesk/epic_department.pdf) (resource)
    - [Epic Security Role Grid](https://www.upstate.edu/imt/intra/pdf/helpdesk/epic_security_grid.pdf) (resource)
* [IMT Help Desk](https://www.upstate.edu/imt/intra/helpdesk/index.php)
  + - [Lawson Account Request form via Self-Serve](https://selfserve.upstate.edu/ais/applications/forms_manager/views/lawson.cfm)

*(for staff that will complete purchasing requests-can complete once employee has an ID#)*

* + - [Network Account Request via Self-Serve](https://selfserve.upstate.edu/ais/applications/forms_manager/views/lan.cfm)
    - [Work Order Request-Telecommunications](https://www.upstate.edu/imt/intra/telecomm/services/work_order.php) *(if needed)*
* Review [Ambulatory Clinical Onboarding Checklist](https://view.officeapps.live.com/op/view.aspx?src=https%3A%2F%2Fwww.upstate.edu%2Fnursing%2Fdocuments%2Fambulatory_clinical_new_hire_onboarding_process_checklist_07132024.docx&wdOrigin=BROWSELINK) (ASO Process checklist for managers)
* Email your new hire in the days prior to their start, welcoming them to the team and introducing yourself. Utilize the [Sample Welcome Email](https://www.upstate.edu/nursing/documents/sample_welcome_email.pdf) as a template. New hire personal emails can be found on their application to the position.
* Create a training calendar to introduce your new employee to their role, department, and Upstate. Outline what Orientation periods will look like for the new hire within the clinic environment. See the following link for a [blank calendar template](https://safetytrendz.com/wp-content/uploads/2020/10/blank-calendar-16.png).
* Determine who will pick the new hire up from NEO.
* Schedule a biweekly 1:1 with your new team member for their first day in clinic. This meeting can be brief, but should provide a warm welcome, an overview of what to expect during their orientation, and please share what success will look like in the role. Share the Employee Onboarding guide and answer any questions from your new employee.
* Assign another team member as an Employee Champion/[Preceptor](https://upstate.ellucid.com/documents/view/772) for the new team member. Typically, this is an individual with tenure in the same role as your new hire. The goal of this relationship is to offer peer support and guidance.
* The meeting cadence can be casual 15-minute check-ins for the duration of the new hire’s orientation, ideally to understand training needs and assess progress. Utilize the [Bi-Weekly Orientation report form](https://upstate.ellucid.com/documents/view/12598) to record progress during check in meetings.
* Ensure the new hire is added to any recurring team meetings.

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## Manager – Week 1 Checklist

* Attend new hire 1:1 and review:
  + Training calendar
  + Employee Onboarding Guide
  + Performance Program/Probationary Report and Job Responsibilities
  + Frequency of team and 1:1 biweekly meeting
  + How to submit their weekly and/or monthly timesheet in Self-Serve (monthly)/Kronos (bi- weekly).

\*\* if they click in and out, show them where their designated timekeeping device is

* Review necessary access to all systems and drives with your new hire (Teams, Clinic Specific Drive, Outlook, Epic department views, Self-Serve Orientation checklists)
* Reach out to your new employee at the end of the day to inquire about any questions or assistance needed.
* Schedule shadowing opportunities with the following groups:
  + Administrative Staff
  + Providers
  + Nursing Staff
  + Call Center (if applicable)

## Manager- First 14 Days Checklist

* Introduce new hire at the first team meeting.
* Provide new hire with shadowing schedule.
* Revisit how to submit their weekly and/or monthly timesheet in Self-Serve (monthly)/Kronos (bi- weekly).

\*\* if they clock in and out, show them where their designated timekeeping device is

* Acclimate employee to clinic operations:
  + [Policies](#_Policies_1) and [Procedures](#_Sample_Welcome_Email)
  + Systems Overview.
  + Work hours.
* Schedule a 90-day review.
* Discuss the following with the new employee:
  + Job responsibilities and structure of the Clinic
  + Frequency of team and 1:1 biweekly meeting
  + Discuss performance and career conversations that will take place over the year.
* Ensure employee has completed the following onboarding tasks:
  + Email signature has been updated.
  + Logged into Brightspace.
  + Uploaded a photo in Teams.
* Connect on Friday to discuss the week, answer any questions before the weekend, and ensure they know how to complete their first timesheet.

## Manager - First 30 days Checklist

* Ensure completion of online trainings in Brightspace\*

\*There may be additional courses to complete depending on your new hire’s clinic/position. Please confer with clinic leadership for a full list of clinics specific Brightspace courses.

* Confirm that Self-Serve Orientation PBO Checklist has been reviewed and sign off on (if applicable).
* Check email for any Probationary Report to do items.
* Check Performance Management for to do items.
* Confirm that Shadowing opportunities have been completed.

## Manager - First 90 days Checklist

* Discuss role, performance goals, and expectations.
* Discuss Upstate and Clinic goals.
* Check email for any Probationary Report to do items.
* Check Performance Management for to do items.
* Discuss how performance will be evaluated throughout the year.

## Manager- First 6-month Checklist

* Continue regular meeting cadence with employee to provide feedback.
  + Ask the question, “What is your current comfort level performing what is expected of you at this time?”
* Check email for any Probationary Report to do items.
* Check Performance Management for to do items.
* Discuss activities that support your employee’s professional development.
* Discussion around career development and opportunities that might be available.
* Provide an overview of first year goals and responsibilities.

## Manager- 12 Months Checklist

* Clinic leadership to continue regular meeting cadence with employee to provide feedback.
* Check email for any Probationary Report to do items.
* Check Performance Management for to do items.
* Discuss activities that support your employee’s professional development.
* Discussion around career development and opportunities that might be available.
* Schedule performance evaluation
* Topics to think about in preparation for performance/probationary report review meeting:
  + What skills did they improve upon?
  + What skills would you like the employee to focus on building?
  + Recent successes?
  + Recent misses and learnings?
  + How did you feel about your employee’s first year?
  + What obstacles did they encounter in the first year?
  + How engaged do they feel with the team?
  + Is this what they expected in the first year? If not, how was it different?
  + What does your employee like most about working in **XXX** Clinic?
* Schedule an overview to discuss monthly Performance/Career Conversations throughout the next calendar year.

# Policies

* [Adult Emergency Medical Response Teams: Code Blue, EMS- Policy CM E-15](https://upstate.ellucid.com/documents/view/3714)
* [Ambulatory Dress Code- Policy AMB A-01](https://upstate.ellucid.com/documents/view/98)
* [Confidentiality- Policy UW C-01](https://upstate.ellucid.com/documents/view/2942)
* [Domestic Violence and Workplace Policy- Policy UW V-01](https://upstate.ellucid.com/documents/view/3034)
* [Employee Assistance Program- Policy UW E-10](https://upstate.ellucid.com/documents/view/2969)
* [Equal Opportunity and Non-Discrimination Policy- Policy UW E-01](https://upstate.ellucid.com/documents/view/2961)
* [Harassment Prevention Policy- Policy UW H-01](https://upstate.ellucid.com/documents/view/7223)
* [Uses and Disclosures of Protected Health Information- Policy P-38](https://upstate.ellucid.com/documents/view/1301)
* [Title IX- Policy UW T-05](https://upstate.ellucid.com/documents/view/11351)
* [The Upstate Code of Conduct- Policy UW C-02](https://upstate.ellucid.com/documents/view/2943)
* [Use of Chaperones During Sensitive Medical Examinations and Procedures- Policy CM C-54](https://upstate.ellucid.com/documents/view/2943)
* [Workplace Violence Prevention Policy UW H-01](https://upstate.ellucid.com/documents/view/7223)

# Procedures

* [Emergency Medical Response-Code Blue/EMS Procedure- PROC CM E-15A](https://upstate.ellucid.com/documents/view/4081)
* [Process for Reporting/Addressing Concerns in Ambulatory Care](https://www.upstate.edu/nursing/documents/process_for_reporting_and_addressing_concerns_in_ambulatory_care_072024_nl.pdf)
* Process for opening and closing clinic (link to clinic specific procedure here)

# Additional Resources

* [Ambulatory Clinical New Hire Onboarding Process Checklist](https://www.upstate.edu/nursing/documents/ambulatory_clinical_new_hire_onboarding_process_checklist_07132024.pdf)
* [Ambulatory Division Reporting Structure/Organization Chart](https://upstate.ellucid.com/documents/view/11293)
* [AskHR](https://solutions.upstate.edu/TDClient/650/HRPortal/Home/)- For all your basic HR Questions
* Clinic/Department Organizational Chart (link to clinic specific organizational chart here)
* [Employee Assistance Program (EAP) Brochure](https://www.upstate.edu/hr/document/intra/eap_brochure.pdf)
* [New Hire Sample Email](https://www.upstate.edu/nursing/documents/sample_welcome_email.pdf)
* OneUp- Coming 2025
* Phone list (link to clinic specific information here)
* [Role Clarification- Clinical Staff](https://www.upstate.edu/nursing/documents/role_defined_v3_1.pdf)
* Staff list (link to clinic specific information here)

Last Revised: 08/2024