

CITY OF MADISON

Virtual Onboarding of New Employees

Onboarding, also known as organizational socialization, is a process used to help new hires acclimate to the workplace and start contributing to the vision, Our Madison: Inclusive, Innovative, and Thriving

The Goals of Onboarding

- Make them feel welcome in the agency
- Help them understand the new role and expectations
- Create connections across the department, city, and industry, to help them grow in the new role
- Guide them in exploring technical and people skills needed
- Co-inform a plan for learning and development

Onboarding Timeline

Agency onboarding begins before the employee joins the organization and lasts until the new employee is able to function independently in their role. This guide provides recommendations for that timeline.

The Virtual Onboarding Checklist



Schedule, Job Duties, and Expectations

Everything we do in person can be done remotely or with some creativity



Socialization

Recommend a buddy, do fun team activities online, encourage your Engagement Team to get creative in order to make the new employee feel more at home and connected to the team



Work Environment

Don't need to worry about the office/workspace (yet) but that doesn't mean our work is over. Be sure they are in a safe environment and able to address the demands of the job while working remotely



Technology, Supplies, and Equipment

Once the employee is set up, be sure they know who to go to for what (ie., What can you/buddy answer? What topics are for the department Authorized IT contact? What's for the HelpDesk?)



Learning and Development

This will likely be much more challenging for us during the telework period, but consider what existing resources, knowledge bases, and people have trained team members in the past

Need assistance with your Virtual New Employee Onboarding?

Contact Human Resources at HR@cityofmadison.com or speak with your HR Analyst for assistance. 2

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New Employee Virtual Onboarding Checklist

Note: never include social security numbers or other confidential hiring information

Name:

Start Date:

Before the Start Date

For supervisors, Onboarding begins well before the start date. Here is your opportunity to intentionally craft a welcoming work environment, to prepare your team, and ensure that equipment is ready and tested before the new employee's first day. Great planning here ensures that you are confident and prepared, which means that you can focus fully on your new team member.



Schedule, Job Duties, and Expectations

- ☐ Process your hire in NeoGov. Instructions are available in the [OHC User Guide](#).
- ☐ Prepare [New Employee Onboarding Schedule](#) for the first two weeks
- ☐ Add regularly scheduled meetings (e.g. staff and department) to employee's calendar
- ☐ Assemble electronic New Employee Welcome Packet. Send 5 business days before start.
 - Required Items:
 - ☐ Job description
 - ☐ Welcome letter
 - ☐ [City of Madison Mission, Vision, Values, Service Promise Poster](#)
 - ☐ [IT Telework Toolkit](#)
 - Recommended Items:
 - ☐ Department organizational chart
 - ☐ Department mission, values, service promise
 - ☐ Department contact names, phone, and telework hours list (include IT Authorized Contacts, Equity Team, Civil Rights Coordinator, Departmental Payroll Clerk)
 - ☐ *(Post-Telework) Building and/or office map*
 - ☐ *(Post-Telework) Parking and transportation information*
- ☐ Welcome phone call to new employee (at least 5 business days before start):
 - ☐ Confirm start date, time, and who will call them, confirm phone number, get back-up communication method (e.g., email or skype)
 - ☐ Explain that important information will be sent in an electronic New Employee Welcome Packet. Confirm that the employee is able to receive it via email and confirm email address. If not, send paper packet. Ask the employee to confirm receipt
 - ☐ Explain how telework works and explain how they will pick up City-issued technology, supplies, and equipment
 - ☐ Introduce the concept of an onboarding partner/buddy and get permission to introduce new employee and onboarding partner/buddy via email prior to first day.

- ☐ Request a short bio and picture and get permission to cc them with non-City email on New Employee Intro Message to department/team



Socialization

- ☐ Introduce new employee to department/team via email. Include start date, employee's role, short bio and picture. Copy the new employee, if appropriate.
- ☐ Set up meetings with critical people for the employee's first few weeks, including Agency leaders, team members, cross-functional collaborators, colleagues with similar positions in other agencies
- ☐ Arrange for virtual coffee meeting on Skype or Zoom, where all staff can connect
- ☐ Select and meet with the onboarding partner/buddy and review expectations



Work Environment

- ☐ Order building and/or office area keys, business cards, and name plate
- ☐ Add employee to relevant email lists, SharePoint sites, and shared drives
- ☐ Update department website, SharePoint sites, and [Municipal Government Resource Guide](#)



Technology, Supplies, and Equipment

- ☐ Order technology equipment and software through IT Authorized Contact
- ☐ Request access to appropriate common drives and programs from department IT contact.



Learning and Development

- ☐ Register new employee for New Employee Orientation with HR.
 - ☐ Email HR@cityofmadison.com to schedule the orientation.
 - ☐ A Zoom meeting invitation will be emailed to the new employee's supervisor
 - ☐ When possible, Human Resources will coordinate delivery of physical orientation materials to the new employee's work location
 - ☐ Orientation materials are available in electronic format on the [City of Madison HR >Benefits](#) page and via hyperlinks on the [Employee Orientation Checklist](#)
- ☐ Confirm that new employee is included in New Employee Orientation and has received the Zoom invitation.
- ☐ Arrange for learning and development activities to be an appropriate percentage of the [New Employee Onboarding Schedule](#). Where possible, do your best to vary the learning modes (i.e., online modules, virtual in-person training, hands-on practice and review, discussions, and coaching)

What training, development, learning does the employee NEED . . .

By the end of Day 1: Topic, Time, Mode

By the end of Week 1: Topic, Time, Mode

By the end of Month 1: Topic, Time, Mode

In order to work independently: Topic, Time, Mode

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By End of Day 1

The big day is here! Now is the time to focus on the new employee and make them feel welcome. While part of the day will be spent in City of Madison Orientation, the remainder is a time to begin connecting with the people, the position, and performance expectations.



Schedule, Job Duties, and Expectations

- ☐ Walk through the [New Employee Onboarding Schedule](#), and confirm new employee has received invitations to participate in HR Orientation and any other required meetings or conference calls
- ☐ Provide an overview of the department, using Welcome Packet materials (e.g., mission, values, organizational structure, and goals/work plans)
- ☐ Review job description, outline of duties, and expectations
- ☐ Describe how employee's job fits in the department, and how the job and department contributes to the division and the organization
- ☐ Review hours of work. Explain department policies and procedures including: overtime, use of vacation and sick time, holidays, telework expectations, etc. Explain any flexible work policies or procedures.
- ☐ Address cultural expectations such as how the department uses Outlook, who should have permissions to your calendar, expectations for Skype and Zoom, and how people are interacting with each other during telework



Socialization

- ☐ Make an appointment to connect with the employee via Skype on the first day, preferably at the beginning and end of the day
- ☐ Introduce employee to others in the department by setting up group conference calls with work unit leaders, other managers, or the team
- ☐ Be available to introduce employee to their onboarding partner/buddy at the beginning of their first check in



Work Environment

- ☐ Explain departmental procedures for ordering supplies and ask if there are any immediate needs. If so, facilitate the process for receiving basic supplies as appropriate.

- ☐ Confirm that their telework space is conducive to productive work



Technology, Supplies, and Equipment

- ☐ Walk through the [Information Technology](#) page on EmployeeNet, pointing out the IT Service Center, Training & Support, and Cybersecurity links
- ☐ Review the [Telework Toolkit](#) and remind them of the naming convention to access EmployeeNet resources:
 - Username = log on for your computer (typically department initials + employee initials)
 - Password = single sign-on password (used for your computer, VPN, etc)



Learning and Development

- ☐ Review the Learning and Development activities in the [New Employee Onboarding Schedule](#)
Key Question: What training, development, learning does the employee NEED by the end of Day 1, and how will it be provided?
- ☐ Provide overview for how the department is doing Remote Learning + Development (link) and which online products should be used to access learning content. Walk the employee through the online resources and highlight any courses that should be completed by the end of the day:
Departmental Resources: Manuals, PowerPoint Slides, Books, Job Aids
 - Location
 - TopicOnline Resources: (ex. Udemy, LinkedIn Learning, SkillShare, Microsoft, Excel)
[City of Madison Human Resources – Organizational Development](#) page for more information
 - URL
 - Course NameMeetings or Virtual Trainings: w/team members, City trainings
 - Topic
 - Presenter/Facilitator

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Start Date:

By End of Week 1

To ensure that the new employee leaves the week on a high note, it's important to start looking to the future, especially how they are going to continue building knowledge of internal processes and performance expectations. Establishing a schedule and getting clear on feedback systems will allow your new team member to start settling into the new work environment.



Schedule, Job Duties, and Expectations

- ☐ Set up weekly debrief with employee after attending attends initial meetings, trainings, and begins regular work duties. Also touch base quickly each day via email, Skype, phone call
- ☐ Explain how your department conducts regular check-ins and goal-setting
- ☐ Share departmental work plan and have the employee begin their individual work plans
- ☐ Review the probation process, identify dates for employee onboarding check-ins at end of week 1, end of month 1, and at end of month 6. Provide [Employee Onboarding Check-in](#)



Socialization

- ☐ Arrange welcome gathering, such as a virtual coffee or happy hour, for the department employees and include department Director and key management personnel.



Work Environment

- ☐ Set aside time to talk about telework experiences of your team – what's been working and early lessons learned. Review the [Telework Planning Worksheet](#) for Managers
- ☐ Share the [Teleworking Tips](#) resource on EmployeeNet and ask them to bring questions back to you during daily check-ins



Technology, Supplies, and Equipment

- ☐ Explain how to submit a [IT Service Center](#) ticket
- ☐ Identify any non-IT support resources for department-specific technology, supplies, and equipment
- ☐ Confirm employee's ability to access the following:
 - ☐ Skype, Zoom, Voicemail
 - ☐ Email (email lists)
 - ☐ Shared Drives
 - ☐ SharePoint

- ☐ Munis or other Specialized software



Learning and Development

- ☐ Review the Learning and Development activities in the [New Employee Onboarding Schedule](#)
Key Question: What training, development, learning does the employee NEED by the end of Week 1, and how will it be provided?
- ☐ Walk the employee through the online resources and highlight any courses that should be completed by the end of Week 1:
Departmental Resources: Manuals, PowerPoint Slides, Books, Job Aids
 - Location
 - TopicOnline Resources: (ex. Udemy, LinkedIn Learning, SkillShare, Microsoft, Excel)
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 - Course NameMeetings or Virtual Trainings: w/team members, City trainings
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- ☐ Review learning and development course experience
 - ☐ What classes have been completed?
 - ☐ What are the most important take-aways from the courses?
 - ☐ What are you most interested in learning next?

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Name:

Start Date:

By End of Month 1

By this point, everyone will likely be getting into a groove. The goal is for the employee to expand existing knowledge of processes and to become cognizant of their performance relative to the position and expectations. As that development continues, they should begin to see their role in the context of the larger team, the agency, and the City of Madison's mission, vision, values, and service promise.



Schedule, Job Duties, and Expectations

- ☐ Schedule and conduct regularly occurring one-on-one meetings
- ☐ Continue to provide timely, on-going, meaningful "everyday feedback"
- ☐ Elicit feedback from the employee
- ☐ Review initial draft of employee work plan and if not already begun, ask the employee to complete the [Employee Telework Priorities & Plan](#)
- ☐ Discuss performance
- ☐ Meet with department Payroll clerk to learn how to enter vacation, holidays, sick leave
- ☐ Ensure that they received their first paycheck and ask if they have any questions about withholdings or direct deposit. If so, point employee toward [EmployeeNet > Payroll](#) for resources and contacts



Socialization

- ☐ Continue introducing employee to key people and bringing them to meetings and events
- ☐ Have employee "shadow" the supervisor at conference calls and meetings to get exposure to other departments and support services
- ☐ Support and encourage employee participating on appropriate committees and/or cross-functional teams, both internal and external to City
- ☐ Solicit employee's feedback and suggestions on ways to improve the onboarding experience through: https://www.surveymonkey.com/r/City_HR_Orientation_Onboarding



Technology, Supplies, and Equipment

- ☐ Ensure employee has fully functioning technology, systems access, supplies, and equipment and understands how to use them



Learning and Development

- ☐ Review Learning and Development components of the New Employee Onboarding Schedule to confirm completion of all required training and development activities
- ☐ Ensure employee has completed or is signed up for APM 3-5
- ☐ Identify whether your new employee must attend other required trainings for department or role
- ☐ Encourage participation in committees like the [Multicultural Affairs Committee](#) (MAC), [Women's Initiative Committee](#) (WIC), or [Latinx Community Engagement Team](#) (LCET), [employee associations](#), and learning opportunities such as [Racial Equity and Social Justice Initiative](#) activities.
- ☐ Discuss Professional Development goals and begin discussions of long-term development activities:
 - ☐ [Leadership Development Programs](#)
 - ☐ [City of Madison Professional Development Courses](#)
 - ☐ Industry-sponsored trainings
 - ☐ Required certifications, licensures, and continuing education credits for the role
- ☐ Review the Learning and Development activities in the New Employee Onboarding Schedule

Key Question: What training, development, learning does the employee NEED by the end of Month 1, and how will it be provided?
- ☐ Walk the employee through the online resources and highlight any courses that should be completed by the end of Month 1:
 - Departmental Resources: Manuals, PowerPoint Slides, Books, Job Aids
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 - Topic
 - Online Resources: (ex. Udemy, LinkedIn Learning, SkillShare, Microsoft, Excel)
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Within 3-6 Months

By the three to six month mark, the new employee should become independent in new role. They should be applying skills and knowledge, making sound decisions, contributing to department goals, understanding how their assignments affect others in the organization, developing effective working relationships, and seeing how their work supports the City of Madison's vision.



Schedule, Job Duties, and Expectations

- ☐ Schedule and conduct regularly occurring one-on-one meetings
- ☐ Continue to provide timely, on-going, meaningful "everyday feedback"
- ☐ Review and revise employee's work plan
- ☐ Set a date/time for formal [Employee Onboarding Check-in](#) meeting, end of the month 3
- ☐ Discuss performance and opportunities for professional development



Socialization

- ☐ Discuss how the employee is connecting with team members and discuss creative ways to get more connected with fellow employees during telework
- ☐ Ask about connections to other departments and initiatives and make introductions to help widen the employee's circle of influence and connection



Technology, Supplies, and Equipment

- ☐ Ensure that technology, supplies, equipment are fully functioning and access is consistent
- ☐ Solicit ideas for improving telework through technology



Learning and Development

- ☐ Review Learning and Development components of the New Employee Onboarding Schedule to confirm completion of all required training and development activities.
- ☐ Key Questions: What additional training, development, learning does the employee NEED in order to become independent in the position? What additional training, development, and learning is not needed, but would provide growth opportunities for the employee?
- ☐ Request that the employee uses this discussion to begin an [Individual Development Plan](#)
- ☐ Review the cover page of the Individual Development Plan together and set a date and time for your first Individual Development Plan discussion