



SUPERVISORS' TOOLKIT FOR ONBOARDING



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Introduction

Onboarding, also known as organizational socialization, refers to the process through which new employees acquire the necessary knowledge, skills, and behaviors to become effective members of an organization early in their respective jobs. Onboarding is the bridge between selection and productivity, including activities from pre-arrival through the end of the first year. Onboarding:

- Complements entrance-on-duty process (EOD)
- Brings the New Employee Checklist to life
- Integrates the new employee into the organization's culture

Why is onboarding important?

**Note: Research done by the Society of Human Resources Management has demonstrated that proper onboarding leads to positive outcomes for new employees such as higher job satisfaction, better job performance, greater organizational commitment, and a significant reduction in stress.*

A comprehensive onboarding process fosters positive working relationships that help new employees gain confidence and become productive quickly. It also ensures their successful integration in the organization's culture. Successful onboarding can minimize attrition rates, and develop and sustain an effective workforce. The onboarding process is an opportunity for supervisors to set goals and expectations, train and develop, and provide the resources for better and faster results.

How do you maximize the effectiveness of onboarding?

Onboarding is a collaborative effort between the hiring manager, new employees, and human resources professionals. Effective onboarding produces the greatest return on investment for everyone.

Onboarding keys to success:

- Understanding the Process – Plan ahead. Onboarding starts the moment someone accepts a job offer and continues through his or her first year of employment.
- Communication Strategies – Clear two-way communication is vital in order for new employees to quickly adjust to their new work environment.
- Social Integration – Introduce new employees to the people that they'll be working with. It's very important for new employees to feel socially accepted by their peers and managers.
- Peer Support – Match new employees with an experienced colleague ("sponsor") to help them understand the organization and their new job. This is mandatory at DSS.
- Organizational Knowledge – Every organization has a unique culture, so help them navigate that culture in order to fast track them in becoming productive members of the organization.

Best Practices for Successful Onboarding

- Watch the Recruitment Office's Refresher Onboarding Video in STEPP.
- Get ready, make the first day on the job special.
- Ensure timely submission of the System Access Authorization Request (SAAR) and prepare the new employee's workstation.
- Use the Sponsor Program and In-Processing checklists.
- Make onboarding a team project.
- Engage stakeholders in planning.
- Include key stakeholder meetings as part of the program.
- Be crystal clear with new employees in terms of:
 - ✓ Performance Objectives
 - ✓ Timelines
 - ✓ Roles
 - ✓ Responsibilities
- Ensure the program is consistently implemented.
- Monitor the program continually.
- Use technology to facilitate the process.
- Use milestones – for example 30, 60, 90, and 120 days on the job—and up to one-year post-organizational entry—to check in on employee's progress.

Getting Ready for the New Hire

Once an employee accepts a position, the days or weeks leading up to the first day are critical in building a positive impression and a strong connection.

Although the approach will vary depending on whether the employee is new to the directorate or to the agency, the supervisor's goal should remain the same. The following are the required steps for all new hires:

- **HCMO Collaboration**
 - ✓ Your servicing Staffing Specialist will let you know if your selectee accepted the job. If so, the Staffing Specialist will keep you up to date on your new employee's security clearance status and EOD.
 - ✓ Supervisor's Role Checklist
 - ✓ Sponsor's Role Checklist
 - ✓ In-Processing Checklist
- **Stay Connected**
 - ✓ If there is a long time between the offer and the start date, stay in regular communication with your new employee via E-mail or by phone.

- ✓ Send a packet of introductory information about their position, your directorate or staff element, and the agency.
- ✓ Provide access to on-line trainings required before arrival, (e.g., Cyber Awareness Challenge) and the information systems user agreement
- ✓ Provide critical first day information in advance of the new employee's first day:
 - Where to park
 - Where to report
 - What to wear (dress code information)
 - What documents to bring (e.g., photo ID, social security card, passport, birth certificate)
 - Work schedule options
 - Lunch options
- **Computer and Network Readiness**
 - ✓ Refer to the In-Processing Checklist for action items related to SAARs, computers, landlines, cell phones, hardware/software requirements, and E-mail accounts.
 - ✓ Make sure that the office phone's voicemail is ready for immediate setup.
 - ✓ Provide an updated copy of you division's phone list, department directories, organizational charts, and relevant points of contact.
 - ✓ Set up the new employee's workstation so that he or she has a computer, phone, office supplies, etc. First impressions count, so providing new employees with a clean desk in a cubical (or office) that is "move-in" ready will be a positive first step in this new relationship.
 - ✓ Add the new employee to E-mail lists and calendars.
- **Onboarding Coordinator**
 - ✓ Set aside time to ensure you're available for the first days and weeks of a new employee's tenure. New employees have many questions.
 - ✓ Create a first-week schedule for the new employee so that he or she has something meaningful and productive to do. The schedule should include some free time to read orientation materials or complete other orientation-related tasks. Consider including some or all of the following:
 - One-on-one or small group meetings with other team members. During these meetings, team members might describe their work and how their work integrates with the new employee's duties.
 - One-on-one meetings with the supervisor to discuss job description, performance expectations, Individual Development Plan (IDP), essential trainings, appropriate attire, and work schedules, and proper leave request procedures.
 - Time alone at the workstation so he or she can digest new information and make notes.
 - Tour the facility (gym, cafeteria, security, etc.)

The First Day

Welcoming the new team member

New employees need to feel socially comfortable and accepted by their peers and superiors. Orientation programs help social roles, by helping new employees feel welcome in their new surroundings. A formal orientation program helps them understand many important aspects of their jobs, and their new organization, including the company's culture and values, its goals, history, and overall mission. If you are expected to participate in an orientation program, arrive on time and project a positive attitude.

EOD procedures and paperwork

- Allow the new employee time to attend to his or her EOD appointment
- Verify with the servicing HCMO Specialist that all new hire paperwork has been completed
- Introduce the new employee to managers, colleagues, and team members within the organization. Incorporate leadership if possible
- Introduce the new employee to his/her designated "sponsor"
- Hold a small welcome celebration or go out for lunch together
- Be available as much as possible throughout the entire day

Discuss Time and Attendance

- Hours of operation and work schedule
- Telework options
- Overtime policy
- Absence policy
- Time reporting procedures

The First Week

Continue to meet regularly with your new employees. They need the confidence, clarity, and skills to do the job they were hired to do. To facilitate this, it's important to prepare them for success.

- **Work environment**
 - ✓ Introduce the new employee both internal and external to stakeholders
 - ✓ Allow the new employee time to set up his/ her respective working areas
 - ✓ Point out storage areas for resource materials, supplies, mail boxes, printers, and copiers
 - ✓ Explain building access, security measures, emergency procedures, and mass notification requirements
 - ✓ Issue keys or other means of department access

- **Administrative matters** – Familiarize your new employees with:
 - ✓ Calendar(s)
 - ✓ E-mail system(s)
 - ✓ DSS Intranet – Infolink
 - ✓ Telephone system and etiquette
 - ✓ Office equipment usage, CAC, etc.
 - ✓ Office staff list
 - ✓ Mail room procedures and forms

- **Agency mission assurance, safety, and emergency management procedures**
 - ✓ Ask the new employee to review the information at <http://dssinside.dss.mil/coopEM/default.aspx> to become familiar with how to prepare for, and respond to, hazards and threats.

- **Computer accessibility and network awareness**
 - ✓ Discuss policies and procedures regarding “Acceptable Use Policy” for electronic communications, including information security, confidentiality, and privacy issues.
 - ✓ Ensure the new employee completes all computer-related training.
 - ✓ Review office’s website (internal and external), along with other relevant websites.
 - ✓ Discuss reporting requirements for security incidents.
 - ✓ Provide the contact information for the IT Help Desk.

The First Month

The onboarding process may influence the degree to which a new employee can become productive. Understanding an organization’s politics, goals and values, and learning the agency’s mission and vision are important indicators of how well employees adjust to their new work environment. These indicators are also associated with commitment and job satisfaction. The ultimate failure of onboarding is when potentially good employees withdraw. Losing an employee who is a poor fit or not performing well may be a possible outcome, but losing employees because they are confused, feel alienated, or lack confidence indicates inadequate onboarding.

- **Performance management**
 - ✓ Review the position description to ensure a clear understanding of job duties and responsibilities.
 - ✓ Establish performance objectives and introduce the performance management process.
 - ✓ Discuss the employee trial period (if applicable).
 - ✓ Develop, with the employee’s input, an IDP. Monitor accomplishments.
 - ✓ Define the customer base and discuss expectations for customer service.
 - ✓ Emphasize the importance of ongoing, open communication.
 - ✓ Contact the Human Capital Management Office, Employee Relations Office with performance concerns.
 - ✓ Use the ‘Supervisors Role’ document at Appendix A.

The First Six Months

During the first six months, be clear and consistent about what you expect from your new employee, and how performance is measured so there is no question as to where your new employee should focus his or her efforts. Ongoing feedback and training will support your new employee in becoming a valued member of the organization.

- Review achievements, performance, trainings (IDP), and challenges.
- Discuss mid-term rating.
- Provide feedback.
- Set goals and performance expectations for the next six months.

The First Year

Your newer employees should now be fully engaged in their role, applying skills and abilities, making sound decisions, contributing to team goals, understanding how their assignments affect others in the organization, and developing effective working relationships. They should have a strong understanding of the agency mission and culture. At this point, they will have gained greater confidence in their position and should have begun taking on more complex assignments.

To increase their level of autonomy, you should:

- Review their achievements, performance, trainings, and challenges.
- Continue providing formal and informal feedback.
- Obtain feedback from the employee and from associated team members

Conclusion

Successful onboarding is a key part of any talent management or retention strategy. Agency leaders must understand that an effective onboarding process is critical to guarantee the successful integration of new employees. Every organization has a unique culture, so helping new hires navigate that culture and their place within it is essential. This Supervisors' Tool Kit for Onboarding will help you improve your new employees' learning curve and will improve communications gaps between members of your organization, resulting in a more productive and engaged workforce ready to carry out the agency's overall mission.

Appendix A

Supervisor's Role

The supervisor should ensure that the employee's first day on the job provides a successful start in transforming them into becoming an effective, fully contributing member of the workforce.

Supervisor's Responsibilities (include but are not limited to):

- At the time the selection is made, identify the new employee's sponsor and provide the sponsor contact information to the Staffing Specialist.
- Review the DSS Form 263, "*DSS In-Processing Checklist*" with the sponsor to ensure that you, the supervisor, or the sponsor will address all items on the checklist.
- At least one business day prior to arrival, notify the new employee's co-workers in the office and encourage them to welcome the new employee and offer assistance.
- Ensure that the employee is scheduled for the New Employee Orientation.
- Let the employee know that in the coming days, you will discuss:
 - ✓ Job roles and responsibilities
 - ✓ The organization and how he or she fits in to it
 - ✓ Performance expectations and objectives
 - ✓ The Individual Development Plan
- Meet with the new employee at the end of their first day to answer any questions and closeout the day.

Appendix B

Sponsor's Role

As a DSS sponsor, you are the new employee's "best friend." You are responsible for helping the employee get settled into his or her workspace, building, and the surrounding local area. Please make yourself available to answer questions or offer help finding someone who can offer suggestions and advice about DSS and his or her assigned office.

Sponsor's Responsibilities (include but are not limited to):

- When the job offer is accepted, contact the new employee to introduce yourself, answer any questions, and offer your assistance.
- Ensure that the employee has the contact information for you, their immediate supervisor, and the Staffing Specialist.
- Review the DSS Form 263, "*DSS In-Processing Checklist*," and ensure you are prepared to assist the new employee with all the items on the checklist, as appropriate.
- One business day prior to arrival, contact the new employee to offer assistance and ensure they are prepared to report for work.
- On the first day, escort the new employee to the in-processing location.
- At the conclusion of the in-processing, meet and escort the new employee to his/her work location.
- Identify the employee's office space and help the supervisor, resource advisor, or executive assistant ensure that it is prepared for the first day with:
 - ✓ Telephone and assigned telephone number
 - ✓ Computer, E-mail Address and User ID/Password
 - ✓ Furniture (e.g., desk, chair, file cabinets)
 - ✓ Desk supplies (e.g., pens, notepads, stapler, tape dispenser)
- Provide the new employee with a copy of the *DSS In-Processing Checklist*, so he or she may follow along with planned activities and procedures.
- Assist the supervisor in introducing them to their co-workers and other key personnel.

- Familiarize the new employee with the office areas and facilities (e.g., restrooms, building exits, fitness center, cafeteria, local restaurants, and ATM, if applicable).
- Escort, if necessary, the new employee to the appropriate CAC office to obtain CAC badge (and pentagon access badge, if required).
- During the new employee's first couple of weeks, check in often to see how he/she is doing and answer any questions.

Appendix C

DSS Form 263, “DSS In-Processing Checklist”

The DSS Form 263 is located here:

http://dssinside.dss.mil/DSSLibrary/FormsLibrary/DSS/DSS_263.pdf. The form is two pages, and is depicted below:

DSS IN-PROCESSING CHECKLIST



The following form is designed to assist managers, supervisors, and sponsors with ensuring a smooth on-boarding process for new DSS employees. Supervisors are responsible for ensuring that all items on this form are reviewed and completed as necessary. Sponsors may accomplish this role as directed. This form should be provided to new employees upon arrival so they are aware of outstanding items. Further, employee must sign and date this form when completed. Once completed, this form should be maintained in the Supervisor’s employee file. See DSS Regulation 11-273, “In- and Out- Processing” for further information. All items on this list should be completed within the first thirty days.

DSS Form 263

DSS IN-PROCESSING	EMPLOYEE NAME: _____	OFFICE: _____
NAME & TITLE OF SUPERVISOR: _____		
NAME & TITLE OF SPONSOR: _____		

BEFORE THE EMPLOYEE ARRIVES:

ACTION ITEM
<input type="checkbox"/> Gaining office identifies sponsor and notifies HCMO
<input type="checkbox"/> HCMO sends selection email to appropriate offices
<input type="checkbox"/> Gaining office submits SAR to DSS, IT Support for IT equipment, mailboxes, etc.
<input type="checkbox"/> Gaining office identifies seat, phone, office supplies, manuals, and other required office-specific materials
<input type="checkbox"/> Gaining office coordinates with HCMO and FM concerning payroll obligations such as PCS, Advanced Pay, VSIP reimbursement, etc.

AT THE POINT OF ENTER ON DUTY (EOD) and within next 30 days:

ACTION ITEM
<input type="checkbox"/> Gaining office ensures new employee attends EOD session with HCMO and sends EOD paperwork to HCMO within three days of in-processing session
<input type="checkbox"/> Gaining office coordinates with the appropriate office to obtain parking decals and garage keys/tags/cards, etc. if applicable
<input type="checkbox"/> Employee provides completed DSS 239 (Employee Locator Form) to Supervisor
<input type="checkbox"/> Supervisor ensures employee has received a copy of the Position Description (PD) and SF-50 (see HCMO Staffing)
<input type="checkbox"/> Supervisor ensures Performance Plan is completed and documented in the PAA within 30 days (see HCMO DCIPS)
<input type="checkbox"/> Gaining office ensures new employee has obtained Common Access Card (CAC) from appropriate RAPIDS office
<input type="checkbox"/> Gaining office ensures new employee has keys, safe combinations, etc. if applicable
<input type="checkbox"/> Gaining office confirms new employee email account has been established and employee contact information is updated in GAL (see DSS IT Support for assistance)
<input type="checkbox"/> Gaining office ensures new employee has been added to Alert Rosters
<input type="checkbox"/> Gaining office ensures new employee has been added to local emergency mass notification systems
<input type="checkbox"/> Gaining office ensures new employee has updated emergency contact information in My IIR
<input type="checkbox"/> Gaining office ensures employee is familiar with the Employee Assistance Program (EAP)
<input type="checkbox"/> Gaining office ensures new employee has been briefed on the DoD Telework policy and is familiar with the process for completing appropriate training and associated forms (see HCMO FB for required training, policy, and forms)
<input type="checkbox"/> Gaining office ensures new employee is registered to attend New Employee Orientation (NEO)
<input type="checkbox"/> Gaining office ensures new employee is registered in SkillPort (see HCMO TEDQ for assistance)
<input type="checkbox"/> Gaining office ensures new employee is registered in STEPP (see CDSE for assistance); **New Employees must complete the New Employee Curriculum within 30 days
<input type="checkbox"/> Employee submits travel card application if required (see FM for assistance)
<input type="checkbox"/> Employee registers in Defense Travel System (DTS) (see Organization DTS POC or FM for assistance)
<input type="checkbox"/> Employee completes Defense Agency Initiative (DAI) training and registers for access to DAI timekeeping within one week of start date (see HCMO or DAI Helpdesk for assistance)
<input type="checkbox"/> Gaining office ensures employee is provided with the local Occupancy Emergency Plan
<input type="checkbox"/> Gaining office ensures employee has completed Financial Disclosure Agreement with OSG (if required for position)
ACTIONS TO BE COMPLETED IN COORDINATION WITH DSS SECURITY (if applicable)
<input type="checkbox"/> ID CARDS: <input type="checkbox"/> Badge & Credential <input type="checkbox"/> Pentagon Badge <input type="checkbox"/> Other USG ID Card(s)/ Passport <input type="checkbox"/> Courier Card
<input type="checkbox"/> Gaining office ensures coordination of security briefings (as required)

EMPLOYEE/SUPERVISOR ACKNOWLEDGEMENT	
EMPLOYEE CERTIFICATION: I certify that I have received the government materials, equipment, and documents noted on this form, and that I will be responsible for returning all such materials, equipment and documents to an authorized DSS official upon my departure from DSS.	
EMPLOYEE SIGNATURE: _____	DATE: _____
SUPERVISOR CERTIFICATION: All required in-processing actions have been completed, or will be completed within 30 days of EOD, for the above named individual.	
SUPERVISOR/PROGRAM MANAGER SIGNATURE: _____	DATE: _____

DSS Form 263 DEC 2012

Appendix D

New Employee Check-in Meeting Questions for Managers

Name _____
Position _____

Today's date _____
Start date _____

How is your job going?

Is it what you expected when you were hired?

Any surprises? If yes, what were they?

Has training been helpful?

What training would you add?

Has your Sponsor been helpful?

Can you suggest any changes for the Sponsor program?

Do you have all the equipment and/or work tools you need?

Do you know where you stand in terms of your progress since you started working?

How are your relationships with your co-workers?

Was the New Employee Orientation helpful?

Do you have suggestions on how to improve the New Employee Orientation?

Was the Benefits Orientation helpful? Do you need any additional information regarding your benefits?

Do you have suggestions on how we could improve our work across the department?

Are there any questions you still have/ is anything still unclear?

Is there something we should be providing to new employees that we have missed?

Do you feel out of the loop about anything?

Is there anything that you need and to which you don't have access?

Do you have any general suggestions?

Do you have any general work needs that haven't been met?

Is there anything you would like to tell me that I have not asked you?