

Guide for Orienting New Staff

Every supervisor would like new staff members to learn their jobs quickly and perform them effectively. A carefully designed orientation program lays the groundwork for achieving these results. This guide can help you conduct such an orientation program.

This guide was created in response to supervisors' requests for orientation information and outlines a practical approach to orienting new staff. It was developed with the assistance of supervisors and others throughout the University. The guide consists of a brief introduction, a description of Human Resources' (HR) role in orientation, and a list of specific actions you can take to help your new staff member quickly become an effective performer.

The employment process begins when you recruit and select a new staff member. Whether or not the successful applicant will become a successful staff member depends largely upon how well he or she makes the transition to the job, to you as the supervisor, to co-workers at various levels, to the department, and to Lehigh University.

Orientation is the process of actively managing the new staff member's transition. Without your participation, this process cannot be effective. Orientation should be a shared effort in which the key roles belong to the new staff member, HR, and you.

The role of the new staff member is to learn the job quickly and thoroughly and to perform it effectively and efficiently. Making Lehigh a great place to work continues to be an important priority.

The role of HR is to give your new staff member a basic understanding of Lehigh University as an organization and as a workplace. New staff members attend an HR orientation program shortly after starting work at the University. If the new staff member has not been scheduled for the orientation within three months of joining the University staff, please contact HR at extension 85847. The orientation covers such topics as:

- History, achievements, and structure of the University Career Management
- Workplace Learning and Performance
- Student Affairs
- Benefit programs
- Standards of conduct and performance
- Employment/Salary Administration
- Employee Relations
- LTS overview & computer security
- Campus safety
- Provisional period
- Principles of an Equitable Community
- Transfer and promotion policies

Because each department and each job is unique, certain aspects of the new staff member's orientation must be conducted at the department level. Departmental orientation is an ongoing process, with activities occurring before the staff member's first day of employment and continuing throughout the first year and thereafter.

The remainder of the guide is in checklist form, with key orientation activities shown at their appropriate times. A few of these activities may not apply to your situation but are included so that it may be used University-wide.

While this checklist ends with the provisional period review, the learning process must continue. We urge you to take an active and supporting role as you work with your staff toward the achievement of University goals. We hope this guide will be useful in helping to initiate a process and a relationship that continues for a long and productive period of employment at Lehigh University.

Before the First Day	
<input type="checkbox"/>	<ul style="list-style-type: none"> • Send original <i>Assignment/Appointment Form</i> to PR, HR, and Budget Office
<input type="checkbox"/>	<ul style="list-style-type: none"> • Make sure workplace is available and clean • Make sure equipment/supplies are accessible
<input type="checkbox"/> <input type="checkbox"/>	<ul style="list-style-type: none"> • Develop training plan • FERPA training is provided at that time. If you wish for further Banner Training, contact Melanie A. Rehm at 85530.
<input type="checkbox"/>	<ul style="list-style-type: none"> • Plan first day schedule (tour of the department, introductions, lunch, supplies and resources) • Reserve this day on your calendar
<input type="checkbox"/>	<ul style="list-style-type: none"> • Make sure people know when new staff member is arriving • Familiarize staff with new employee's background

On the First Day	
<input type="checkbox"/>	<ul style="list-style-type: none"> • Be available to personally greet new employee
<input type="checkbox"/>	<ul style="list-style-type: none"> • Conduct tour of work area • Make introductions to other department members and people outside department
<input type="checkbox"/>	<ul style="list-style-type: none"> • Have new staff member complete I9 Form and the W-4 Form (<i>must be processed on first day</i>) • Send original copy of I-9 Form, supporting documentation, and original W-4 Form to PR • Retain a copy of the I-9 Form in department
<input type="checkbox"/>	<ul style="list-style-type: none"> • Contact Margaret J. Petrovich via email at mjp3@lehigh.edu or phone at 610-758-3830 to obtain the Banner LIN/PIN for your new employee. He/she will need that in order to sign on to the email account
<input type="checkbox"/>	<ul style="list-style-type: none"> • Complete paperwork for parking hangtag by clicking here http://www.lehigh.edu/~inubs/parking/Documents/FacultyStaffRegForm.pdf
<input type="checkbox"/>	<ul style="list-style-type: none"> • Contact the ID office to obtain the new staff member's University ID card extension 86169
<input type="checkbox"/>	<ul style="list-style-type: none"> • Help employee create email account by logging onto http://www.lehigh.edu/security/AccountProcedure.html
<input type="checkbox"/>	<ul style="list-style-type: none"> • Describe department <ul style="list-style-type: none"> ○ Name ○ Purpose ○ Position within stem and/or school ○ Organizational chart ○ Staffing ○ Special departmental rules or protocols (dress code, work habits, personal phone calls, decorating work area, requesting time off, etc.)
<input type="checkbox"/>	<ul style="list-style-type: none"> • Discuss job duties and responsibilities <ul style="list-style-type: none"> ○ Provide copy of position description ○ Emphasize confidentiality (sign confidentiality agreement if department has one) ○ Point out importance of the job to the department and need to work as a team
<input type="checkbox"/>	<ul style="list-style-type: none"> • Outline unit organization • Indicate who else will be giving him or her direction • Use organizational chart to explain fit within University and department
<input type="checkbox"/>	<ul style="list-style-type: none"> • Explain work schedule <ul style="list-style-type: none"> ○ Work hours ○ Lunch times ○ Overtime policy ○ Procedure for notification of absence
<input type="checkbox"/>	<ul style="list-style-type: none"> • Review salary and paychecks
<input type="checkbox"/>	<ul style="list-style-type: none"> • Discuss 180 day provisional period (time to learn as much as possible about the new job) • Identify other in the department who can help • Encourage new employee to ask questions

<input type="checkbox"/>	<ul style="list-style-type: none"> • Discuss work environment safety issues <ul style="list-style-type: none"> ○ What to do if injured on the job ○ Fire escape routes ○ Location of fire extinguishers ○ Use of special equipment ○ Toxic chemicals ○ Hazardous waste ○ Radiation ○ Glass breakage ○ Recycling
<input type="checkbox"/>	• Provide directions on setting up telephone (http://www.lehigh.edu/phones/phones.html)
<input type="checkbox"/>	• Offer suggestions for lunch by taking him or her out to lunch
<input type="checkbox"/>	• Begin job training including the United Educator Sexual Harassment training and Child Abuse Training accessible at https://www.edurisklearning.org
<input type="checkbox"/>	• Talk to your employee about personal use of Lehigh equipment, email etiquette, use of cell phone, and confidentiality
<input type="checkbox"/>	• Discuss expected behaviors for employees within department and University
<input type="checkbox"/>	• Elicit and discuss questions and concerns at end of the day

Second to Tenth Days	
<input type="checkbox"/>	• If your new hire is a full time employee, he/she will be scheduled for a benefits orientation in the HR Conference Room. The date and time is indicated on the second page of the offer letter.
<input type="checkbox"/>	<ul style="list-style-type: none"> • Discuss the importance of interacting courteously and effectively with customers • Explain department's customer service standards
<input type="checkbox"/>	<ul style="list-style-type: none"> • Actively manage staff member's training including the required United Educators training regarding child abuse and harassment • Inform staff member of other sources of training: <ul style="list-style-type: none"> ○ Lehigh University's <i>Workplace Learning and Performance Schedule</i> ○ <i>The BEST Program</i> ○ <i>New Employee Orientation</i> ○ Plus of Us ○ <i>Crucial Conversations</i> • Sign staff member up for supervisory training (if applicable): <ul style="list-style-type: none"> ○ <i>Legal Updates</i> ○ <i>The Lawful Leader</i> ○ <i>Informal Network Harassment Training</i>
<input type="checkbox"/>	<ul style="list-style-type: none"> • Provide performance feedback to the staff member • Make expectations clear • Offer training and constructive feedback • Give positive reinforcement
<input type="checkbox"/>	• Elicit and discuss questions and concerns
<input type="checkbox"/>	• Discuss performance standards and expectations periodically

After 2 Weeks	
<input type="checkbox"/>	<ul style="list-style-type: none"> • Meet with the new employee to: <ul style="list-style-type: none"> ○ Check understanding of responsibilities and procedures ○ Check comfort level and give opportunity to ask questions ○ Document the staff member's strengths and weaknesses to facilitate provisional period report ○ Contact Human Resources if you have concerns about the employee's performance
<input type="checkbox"/>	• Discuss and coach new employee in areas of improvement and/or advancement to ensure excellence

After 4 Weeks	
<input type="checkbox"/>	<ul style="list-style-type: none"> Meet and Evaluate progress
<input type="checkbox"/>	<ul style="list-style-type: none"> Establish additional objectives or set objectives for improvement
<input type="checkbox"/>	<ul style="list-style-type: none"> Check progress in training programs
<input type="checkbox"/>	<ul style="list-style-type: none"> Elicit and discuss questions and answers

After 8 Weeks	
<input type="checkbox"/>	<ul style="list-style-type: none"> Meet and Evaluate progress
<input type="checkbox"/>	<ul style="list-style-type: none"> Establish additional objectives or set objectives for improvement
<input type="checkbox"/>	<ul style="list-style-type: none"> Check progress in training programs
<input type="checkbox"/>	<ul style="list-style-type: none"> Elicit and discuss questions and answers

At 90 days (3 months)	
<input type="checkbox"/>	<ul style="list-style-type: none"> You will receive an email stating that the provisional period form has been launched (no formal action is needed at this time) Schedule a meeting to informally discuss the new hire's performance Print out a copy of the new hires Position Description Discuss each accountability and review what has been reviewed and what has not Set goals and objectives if appropriate Set performance expectations through the six month provisional period

At 180 Days (6 months)	
<input type="checkbox"/>	<ul style="list-style-type: none"> Prepare the <i>Provisional Period Progress Report</i> (You will find this by going into the GPS tool directly through the portal. When you sign in your new staff member's provisional report will be available).
<input type="checkbox"/>	<ul style="list-style-type: none"> Inform staff member when he or she has completed the 180-day provisional period Schedule a meeting to discuss performance and review the <i>Report</i> Discuss each accountability and review what has been reviewed and what has not Set goals and objectives Set performance expectations for the following year
<input type="checkbox"/>	<ul style="list-style-type: none"> Remind staff members that Lehigh has a merit pay system with merit raises generally effective July 1 of any given year (if hired before March 1)