

## Journey Steps

Which step of the experience are you describing?

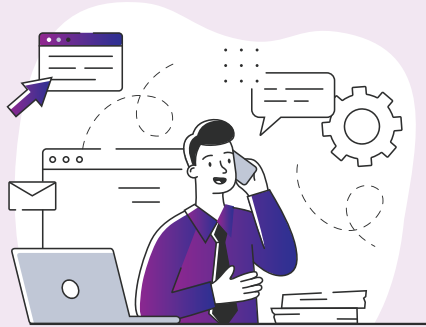
### OFFER TO START

### WEEK ONE (DAY 1 +)

### MONTH ONE

### OFFBOARDING

## Organizational



#### Job Offer and Start Date

Manager pre-setup hoteling space for equipment distribution, orientation, and training

Use supporting tools/resources, e.g. Onboarding checklist for smooth transition.

Update Employee Contact List

#### Facility

- Tour - Emergency Preparedness - Offices
- Hotel Space - Provide Badge

#### Meetings

- Onsite/Offsite - Invite to recurring
- Invite to relevant groups

#### Training

- Schedule New Employee Orientation
- Initiate and Complete required - Hybrid Workforce

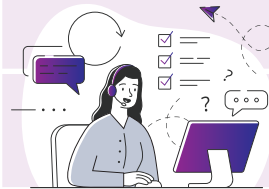
Meets with HR to complete benefits and payroll paperwork

Set up with first significant task to work through with manager

#### Review

- Duty Statement - Expectations - Telework Policy
- Hoteling process - Org Chart, Vision, Values
- Week One checklist
- Employee Contact List

Pair up with an onboarding sponsor



Employee aware of Resources/Tools

Schedule a one-on-one to provide performance feedback, address concerns, etc.

Identify employee assignments, resources, completion dates & success measures.

Acknowledge and recognize accomplishments and milestones.

Review progress with Onboarding Sponsor.

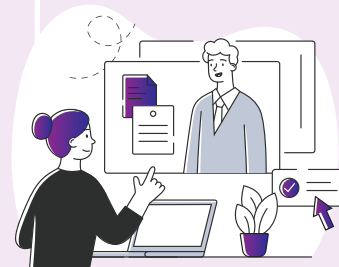
#### Assignments

- Working with employee on completing first assignment
- Review all

Check Mandatory Training Progress

Have anonymous evaluation regarding onboarding process, new employee to provide

Provide department- specific training plan to ensure proficiency in job tasks and organizational norms.



Exit Interview

Complete employee separation checklist

## Technical

#### Request Employee Access

- User Account - Shared Folders
- Email - Telework(VPN/VDI)
- Collaboration(Teams/SharePoint/etc)

Collect Equipment/Badge

Delete access to account and email

## Social

Send a Welcome Package

Welcome meeting by manager upon arrival and orient employee to first day/week.  
Receives a welcome gift/card  
Introduced to the team, in-person and virtually (cameras on)

Schedule team building to assimilate new employee

Schedule individual or small group meetings with various team members

Farewell party

Retirement Gift

## General Tips

What things does the Supervisor or Manager need to be conscious of?  
(Used data from our Research/Interviews)

Ensure an HR person is available to assist in filling out new hire forms. Medical, Dental, etc.

Verify before the start date that all Employee Access is completed. (Badge, User Account, etc)

Training Employee needs proper equipment for telework. Internet access, peripherals, etc.

First impressions are everything. Planning and preparation are critical.

Early planning and preparation for onboarding.

- Organizational - Social - Technical

Most employees don't have their equipment ready on the first day.

Ensure start date is in accordance with orientation and meets HR guidelines/needs.

Tools: Employee needs proper equipment for telework. Internet access, peripherals, etc.

Ensure to address any employee questions/concerns  
Schedule frequent check-in meetings



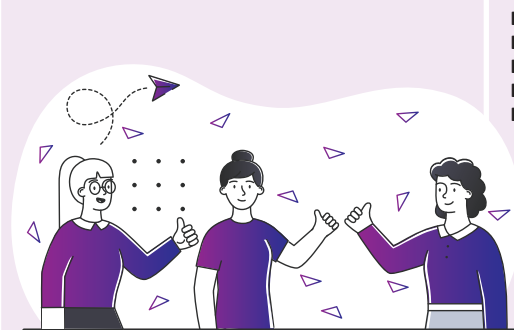
Schedule face to face (in-person/camera on) meetings to help build the team

Include photo of employee in the announcement you send to the team.

Touchpoint to review & assess expectations

Review performance (IDP) for any additional training needs

Help New Hires Build Connections



Review exit interview in-depth and impartially.

Take feedback into consideration.

Do Be Consistent  
Do Validate Feelings  
Don't be Defensive  
Don't Be Sloppy  
Don't Lose the Big Picture

## QUICK REFERENCE LINKS

### **California State Onboarding Resource**

<https://www.calhr.ca.gov/state-hr-professionals/pages/Onboarding.aspx>

### **Welcome Packet Checklist**

<https://www.calhr.ca.gov/Documents/wfp-Welcome-Packet-Checklist.docx>

### **Onboarding Checklist**

<https://www.calhr.ca.gov/Documents/wfp-onboarding-checklist.pdf>

### **Hiring supervisor checklist**

<https://www.calhr.ca.gov/state-hr-professionals/Pages/Onboarding-Program-Resources.aspx>

### **Statewide Training**

<https://www.calhr.ca.gov/Training/Pages/main.aspx>

### **On the Job Training**

<https://www.calhr.ca.gov/Training/Pages/on-the-job-training.aspx>

### **California State Telework Guide**

<https://telework.govops.ca.gov/>

### **DGS Telework Dashboard**

<https://telework.govops.ca.gov/track-telework/>

### **Employee Assistance Program**

<https://www.calhr.ca.gov/employees/pages/eap.aspx>