Lifespan Human Resources
Delivering health with care®

The Manager's Checklist for Onboarding New Employees

Employee Name:	Position:
Start Date:	Department:

TWO WEEKS BEFORE EMPLOYEE STARTS:

- ❑ Notify team the position has been filled and the new employee's tentative start date
- ❑ Assign employee a "buddy" (see "Checklist for Lifespan Buddy")
- ❑ Create employee's first week's schedule
  - *Assign team members to meet with employee to discuss different topics specific to department and role*
  - *Include key meetings, lunches with staff members, training sessions, etc.*
- ❑ Review employee schedule with key team members assisting with new employee department orientation
- ❑ Create the B file for employee to include:
  - License verifications (if applicable)
  - Unit/dept. specific Orientation checklist
  - NetLearning/Transcript Education
    - *If the employee's NetLearning courses are reviewed and confirmed completed annually, managers are not required to place in employee B File*
  - Annual Unit / Dept. specific Competencies
  - Performance evaluations

IF APPLICABLE:

- ❑ Request cell phone through the Tech Center: Vanessa Hall, VHall@lifespan.org (Director must email request)
  - *Please note delivery time is between three to five business days depending on inventory with the vendor*
- ❑ Request pager through IS Self-Service Portal
- ❑ Complete a purchase order for laptop/computer

WITHIN A WEEK BEFORE EMPLOYEE STARTS:

- ❑ Call or send employee a welcome email to include:
  - Arrival time on day one in department
  - Name of contact (if not manager) who will meet new employee on first day
  - Schedule
  - Dress code
  - Parking information
- ❑ Receive email from MSIdentityManager@lifespan.org (MIM) with new employee's Lifespan email address and login information
  - *If you do not receive this email within a week before employee starts, contact Lifespan Service Desk at 444-3681*
- ❑ Send LIAM (Lifespan Identity Access Management) request for employee access to share drives and applications
- ❑ Log into NetLearning to confirm employee appears in "myTeam"
  - *If employee does not appear in "myTeam" contact the LMS Administrator at* lms-admin@lifespan.org
- ❑ Review LifeChart Training Catalog on Lifespan intranet to view LifeChart training classes required for employee's position
- ❑ Select new employee from "myTeam" in NetLearning and register employee for LifeChart training classes (if applicable)
- ❑ Add employee to department email distribution lists for department communications
- ❑ Invite employee to reoccurring meetings and schedule first 1:1 meeting within two weeks of start date
- ❑ Confirm when employee is attending New Employee Orientation

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FIRST DAY IN DEPARTMENT:

- ❑ Confirm employee has Lifespan I.D. badge and a parking assignment
- ❑ Confirm employee has access to appropriate drives/ folders/ files and other department specific software
- ❑ Confirm employee appears in Microsoft Outlook and Staff Directory
    - *Call Lifespan Service Desk at 444-6381 if employee does not appear in Microsoft Outlook or Staff Directory*
- ❑ Review first week's schedule and schedule one-month touch base meeting

FIRST WEEK:

- ❑ Touch base with employee at least once per day
- ❑ Review Department policies, safety procedures, fire and evacuation plan
- ❑ Confirm employee has completed assigned system-wide courses in NetLearning:
    - *Cultural of Safety, Lifespan Corporate Compliance Video, Lifespan Active Shooter Preparedness, Cultural Sensitivity Training, Discrimination-Harassment, IS Security – HIPAA Security Compliance, IS Security Passwords and IS Security – Spear Phishing*
- ❑ Review and complete unit/ department-specific competencies
- ❑ Review department specific Netlearning assignments that need to be completed (if applicable)

FIRST TWO WEEKS:

- ❑ With approval and input from employee, develop and distribute a welcome biography to team
- ❑ Have a "coffee hour" to welcome/introduce employee to department
- ❑ 1:1 meeting
    - Meet with employee to establish manager and employee expectations
    - Review Lifespan's Shared Values
    - Discuss department organizational chart
    - Review Netlearning assignments specific to department/position
    - Review pay cycle and earned/vacation/sick time
    - Review attendance policy
    - Discuss questions/concerns

ONE MONTH:

- ❑ Meet with new employee for 30-day check-In
    - *Refer to Manager New Employee Discussion Guide for 30/60/90 Day Check-Ins on page 4*
- ❑ Confirm employee completed Netlearning assignments required by department (if applicable)
- ❑ Schedule six-month introductory performance review meeting

TWO MONTHS:

- ❑ Meet with new employee for 60 - day check-In
    - *Refer to Manager New Employee Discussion Guide for 30/60/90 Day Check-Ins on page 4*

THREE MONTHS

- ❑ Meet with new employee for 90 - day check-In
    - *Refer to Manager New Employee Discussion Guide for 30/60/90 Day Check-Ins on page 4*

SIX MONTHS:

- ❑ Conduct employee's six-month introductory performance review:
    - Discuss questions and concerns of the job
    - Discuss employee strengths
    - Discuss experience and expectations
    - Ensure employee has the tools needed to do the job properly

SIX TO 12 MONTHS:

- ❑ Give employee a copy of the annual Performance Review form to review and have employee think about goals for the coming year
- ❑ Have employee review job description for accuracy
- ❑ Confirm employee has completed all Netlearning assignments
- ❑ Complete annual Performance Review

- Discuss employee's performance
- Discuss Merit increase award (non-union employees); refer union employees to bargaining agreement for information on pay increase
- Set goals and objectives for the coming year

- [ ] Review employee's overall on-boarding experience for the year:
    - What went well?
    - What could be done differently?
    - What steps can be taken to make it a better experience?
- [ ] Review online learning classes which are available to enhance current job skills or develop new skills
- [ ] Discuss employee's career advancement/professional development goals
    - Identify ways to engage employee in hospital or system wide activities

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Manager New Employee Discussion Guide for 30/ 60/ 90 Day Check-Ins

Use this guide to gauge how your new employee is adjusting to their new position. Meet with each new employee after the first 30, 60, and 90 days of employment and ask these questions. If your new employee's responses signal that they might be a retention risk, consider meeting with the new employee more frequently to monitor their progress and intent to stay.

Baseline Expectations	Signals of possible retention risks
1. Has this job met your expectations? In what ways? Where has it fallen short? 2. Do you have the tools and equipment you need to do your job?	• Answer to primary question is no • Expectations about work conditions are unrealistic
Acculturation	**Signals of possible retention risks**
3. Which coworkers have been especially helpful to you? 4. From what sources have you obtained information about news in the department and organization? 5. Tell me about some of your successes during your first [30/60/90 days].	• Unable to provide examples of helpful colleagues or personal successes • Information sources listed are unreliable
Challenges	**Signals of possible retention risks**
6. Describe any frustrations you've experience so far. 7. Have you done anything to address these frustrations?	• High number of frustrations • Has not tried to resolve problems • Blames others for problems • Is bothered by typical conditions of department
Suggested Onboarding Improvements	**Signals of possible retention risks**
8. In what areas would more training be helpful for you and other new hires? 9. If you could change one aspect of your experience in the department, what would it be? 10. On which aspects of your job performance would you like more feedback?	• Uninterested in personal feedback/development • No desire to help department improve
Overall Concerns	**Signals of possible retention risks**
11. Do you have any concerns about your job that I could address?	• High number of concerns • Does not share any concerns but appears dissatisfied or anxious

Lifespan
New/Transferred Employee Departmental Orientation Checklist

Upon completion, each item should be initialed by both the employee and supervisor. This form should be reviewed as soon as possible after the employee's start date, but does not have to be completed in the order listed. It should be used for both new and transferred employees.

To the Supervisor: **This checklist is to be used to orient new employees to your department. Please return the completed form to your site Human Resources Office.**

Name of Employee ______________________ Title ______________________
Department/Unit ______________________ Employee # ______________________
Name of Supervisor ______________________ Phone # of Supv. ______________________
Name of Department Head ______________________
Start Date ______________________ Introductory Period Completion Date ______________

Please check one: □ New Hire □ Transfer □ Contract

The following areas have already been covered in the Human Resources orientation:

WAGE, SALARY, TIME, BENEFITS, EMPLOYEE HEALTH: *Time Reporting and Paycheck Distribution, Overtime, Meal and Rest Breaks, Benefits.*

INSTRUCTIONS: To the left of each issue, indicate the date this was reviewed with the new/transferred employee and have both the employee and the supervisor initial that item. If an issue is determined not to be applicable to this person's work, indicate such by writing NA in this space.

CHECKLIST

Emp.	Supvr.	Date	
			EMPLOYEE TRAINING AND BEHAVIOR
____	______	___/___/___	Employee Orientation and Training: content, expectations, duration
____	______	___/___/___	Performance Recognition and Employee Development System
____	______	___/___/___	Confidentiality: has read and understands Policy
____	______	___/___/___	Conflict of Interest: has read Policy and signed form if appropriate
____	______	___/___/___	Tour of Facility(s), including appropriate department areas
____	______	___/___/___	Personal Appearance, including dress or uniform guidelines
____	______	___/___/___	Use of Telephones: business vs. personal use;etiquette;security & confidentiality
			DEPARTMENTAL ORIENTATION
____	______	___/___/___	Job Description
____	______	___/___/___	Competency Assessment, including Age-Specific Competencies
____	______	___/___/___	Introduction to staff
____	______	___/___/___	Explanation of structure and supervision within department
____	______	___/___/___	Schedules: staff meetings; work assignments; paid time off reporting and approvals; meal and break periods
____	______	___/___/___	Availability of Policies and Procedures
____	______	___/___/___	Quality Improvement- Concepts and tools in daily work
____	______	___/___/___	Notification of union status, if applicable
			LIFE SAFETY AND EMERGENCY PREPAREDNESS
____	______	___/___/___	Ensuring Personal Safety and Property Security
____	______	___/___/___	Security and Safety Incident Reporting
____	______	___/___/___	Fire Protection/Detection Systems, Materials and Equipment
____	______	___/___/___	Emergency Plans: announcements, procedures, evacuation routes, command centers
____	______	___/___/___	Facility and Field Security

Emp.	Supvr.	Date	
			EQUIPMENT MANAGEMENT
____	______	___/___/___	List of equipment employee may use
____	______	___/___/___	Equipment Orientation and Training
____	______	___/___/___	Safety Testing
____	______	___/___/___	What to do in cases of equipment failure
			HAZARDOUS MATERIALS AND WASTE MANAGEMENT
____	______	___/___/___	List of specific hazardous materials employee may encounter in work areas
____	______	___/___/___	Classifications of Hazardous Materials
____	______	___/___/___	Labeling of Hazardous Materials: how to read; discuss policy
____	______	___/___/___	Material Safety Data Sheets (MSDS): Format; content; how to obtain; where to file
____	______	___/___/___	Detection of Presence or Leak of Hazardous Materials
____	______	___/___/___	Personal Protection Equipment and Engineering Controls
____	______	___/___/___	Exposure, Reporting, and Follow-up
			INFECTION CONTROL PROGRAM
____	______	___/___/___	Blood Borne Pathogens: prevention and control
____	______	___/___/___	Detection of Pathogens
____	______	___/___/___	Personal Protection Equipment and Engineering Controls
____	______	___/___/___	Exposure, Reporting and Follow-up

Manager Resources

IT/ Computer issues:

Help Desk

Phone: 401-444-6381

https://lifespan.saasit.com/

Benefit or Retirement questions:

HR Solution Center

Phone: 401-444-5265

Fax: 401-444-5374

Email: Benefitscenter@lifespan.org

Retirement@lifespan.org

Payroll/ Workbrain questions:

Ask Payroll

Phone: 401-444-4721

http://intra.lifespan.org/askpayroll

Email: askpayroll@lifespan.org

Requesting access to shared drives, applications, etc.

LIAM

(Lifespan Identity Access Management)

http://intra.lifespan.org/ls/issecurity/liam.htm

Coastline EAP

Employee Assistance Program

http://benefits.coastlineeap.com/

401-732-9444

800-445-1195