

Process Guide for HR & Managers – New Hire Preparation

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About This Document

owner	HR
access & use	Restricted to Managers
what it is	A combined process guide for HR and Hiring Managers that outlines what needs to be done to bring a new employee into the company, before they arrive and on their first day
who uses it	HR and Managers involved in preparation for and orientation of new hires

Overview




About this process

It's important to prepare well in advance when new hires join the company so they feel welcomed and confident about their choice to join the company.

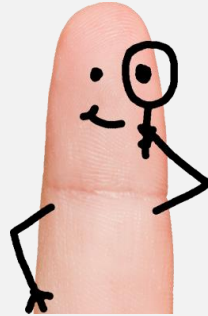
Supporting documents

There are a number of templates and guides available to support you through the process. The rest of this Guide describes when to use each one, but they're listed below for quick reference.

Click on an icon in the table below to open that document.

- ◆ Click  to open the template or guide
- ◆ Click  to open instructions on how to use the template, spreadsheet or form
- ◆ Click  to open a completed example of the template or form

Note: The **Doc ID** column contains a unique identifier for all our HR documents. Think of it like a bar code you don't have to pay attention to, unless you want to double-check you have the right document.



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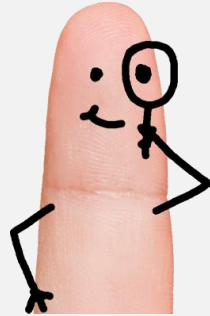
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- IT Administrator
 - Payroll & Benefits Coordinator
2. Send two meeting requests at the same time to all individuals listed above so they have two reminders in their calendars to do their tasks and the date they need to be done by:
 - First reminder – calendar entry dated 7 days before the new hire’s start date
 - Second reminder – calendar entry dated the day the new hire starts
 3. Use the script below as a starting point. Copy and paste it into the meeting request email, then modify as appropriate, replacing the text enclosed in angled brackets with information related to this new hire.



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Step 4. Prepare for probationary period

1. Send meeting requests to the Hiring Manager for 3 separate dates, to serve as reminders to assess the new hire's performance at the end of the probationary period, or renew/extend the contract for a temporary employee or contractor:
 - First reminder – Two weeks before the end of the probationary period outlined in the employment contract
 - Second reminder – One week before the end of the probationary period
 - Third reminder – The day the probationary period ends
2. Use the script below as a starting point. Copy and paste it into the meeting request email, then modify as appropriate, replacing the text enclosed in angled brackets with information related to this new hire. Two scripts are provided—one for regular status employees and one for temporary or term employees, or contractors.

NOTE: The meeting request reminders you send to Hiring Managers will also be in your calendar. It is HR's responsibility to follow up with the manager and ensure the probationary review process is followed.

Example Email Script – Regular Status Employees

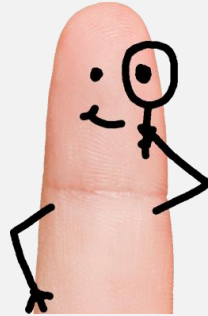
Subject line: Preparation for <New Hire Full Name>'s end of probationary period dated <date>

<New Hire Full Name>'s probation period ends on <date>. By <date – 1 week before end of probationary period>, please ensure that you:

1. Finalize the ratings in the [Probationary Period Review Form](#) that you created for the open position.
2. Determine if they will successfully complete the probationary period.
3. Advise HR of your decision.

Refer to the following guides:

4. [Performance Management Overview Guide](#)
5. [Process Guide for Managers - Probationary Period](#)



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Prepare for New Hire – Manager

▶ MANAGER

Step 1. Confirm logistical needs

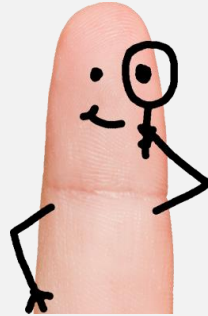
Review [New Hire Preparation Guide for Administration](#) to understand the administrative tasks done by IT, the Office Administrator, and Payroll to prepare for the new hire.

1. As soon as the candidate has accepted the offer, coordinate with IT to:
 - a. Ensure the new hire's email is set up at least 1 week prior to the start date
 - b. Communicate computer equipment and software application requirements
 - c. (If the new hire is a manager) Advise access permissions for Manager-restricted HR folders and resources.
2. Determine if a phone card or mobile phone is required. If so, advise CUSTOMIZER: Insert Title at least CUSTOMIZER: Insert length of time, e.g., 1 week in advance
3. Determine if a credit card is required. If so, advise CUSTOMIZER: Insert Title at least CUSTOMIZER: Insert length of time, e.g., 1 week in advance.
4. Determine if parking is required. If so, advise CUSTOMIZER: Insert Title at least CUSTOMIZER: Insert length of time, e.g., 1 week in advance.
5. If the new hire is filling a new position and represents an increase to headcount:
 - a. Determine the seating and workspace arrangements with the CUSTOMIZER: Insert Position title responsible for office seating.
 - b. If an office or more desirable work space is required, you must obtain approval from CUSTOMIZER: Insert Position title responsible for office seating in advance.

Step 2. Announce new hire to Company

Communicate the new hire's pending arrival to all staff as soon as is feasible. This lets them start thinking about how to prepare for the new hire's arrival. Send out an announcement email as soon as appropriate after the offer has been accepted.

Use the script below as a starting point. Copy and paste it into an email, then modify as appropriate, replacing the text enclosed in angled brackets with information related to this new hire.



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- Block off the new hire's first day in your calendar (or at least the morning and lunch) to make sure you have time to spend with them
 - Schedule meetings for them to meet with immediate stakeholders, direct reports, and peers. These meetings will help them gather information, meet key team members, and understand how we do things here
4. Set your new employee up for success right from the first day:
- Prepare a printed agenda for the new hire's first week, to be reviewed on their first day. Make sure to include the first morning orientation schedule set up by HR, which will include meetings with you, the Office Administrator, IT, HR, and lunch with you
 - Assign a 'go-to person' to support them for the first 2 weeks
 - Gather reading material, files, and relevant resources to help bring them up to speed
 - Prepare to give the new hire something tangible to work on as soon as they arrive, and be available to provide extra guidance throughout the first few tasks. It's important that both you and the new hire understand exactly what's expected of each other
5. Prepare a [Skills Gap Assessment Form](#) for the new employee's position. Customize the form template so that it's ready for new hires to complete on their first day.

Step 4. Prepare for probationary period

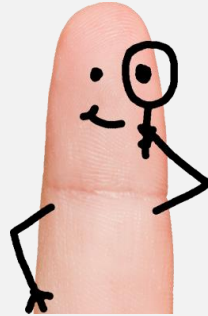
1. Review the [Process Guide for Managers – Probationary Periods](#).
2. Review the [Probationary Period Review Form](#) for the position and update it with the hiring information and dates.
3. Provide a copy of the form to HR for inclusion as an addendum to the individual's Employment Agreement. This ensures the employee understands the performance standards up front.

First Day – HR



Step 1. Meet with new hire

1. Review the [Orientation Presentation](#) with the employee.
2. Present and review the printed materials binder/folder you have prepared (see above).



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Step 2. Set expectations for working together

Setting and communicating targets and standards keeps an employee interested and ensures that evaluating performance is hassle-free. It also makes it easier for you to monitor performance and take corrective action.

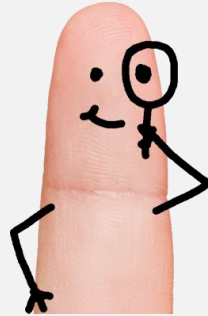
The first few months in a new position are the most critical as they set the tone for what to expect thereafter. From day one, be clear about your expectations.

Clarify other areas that affect the employee and their role on your team. For example:

- ◆ Can the employee use personal electronic devices at work? What about personal use of the computer?
- ◆ How best to get your attention? Email? Phone call?
- ◆ When are you available? Are you an 'open door' manager? All the time or only during certain hours?
- ◆ What if you're not around? Who should the employee ask for advice on a work assignment?
- ◆ What about obtaining signatures for approvals while you are away?
- ◆ How much autonomy does the employee have to make decisions? Under what circumstances must they check in with you or someone else?
- ◆ When do you expect the employee to be at work? Is an alternative work schedule possible now or in the future? Can the employee work from home?
- ◆ How does the employee get approval to use leave time? What do you expect if the employee realizes he/she will be late?
- ◆ What about using sick leave? Who to call? When? Review your absence recording process.
- ◆ How do you handle the employee working additional hours?
- ◆ What are your priorities in the department? What's the most important work that the new employee should always put first? Do you expect employees to offer to help others when their assignments are done?
- ◆ How open are you to suggestions or alternative ways of working?
- ◆ How much leadership and initiative do you expect from your employees?

Step 3. Assign work

1. Discuss the probationary period and performance expectations, and set objectives. Refer to Process Guide for Managers - Probationary Periods.



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