

Process Guide for HR & Managers – New Hire Preparation

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Doc ID	Document Name	Description	Doc	Help	Ex.
OO-ALL-3950-R.	New Hire Preparation Guide for Administration	Guide for administrative staff on steps required to bring a new hire on board			
PP-MGR-3100-S	Process Guide for Managers –Probationary Periods	Outlines a step-by-step process for managers of the probationary period process, and explains who's responsible for each step			
PP-MGR-3110-M.	Probationary Period Review Form	Form template for defining position success factors and setting performance expectations for new or transferred employees		?	
TD-ALL-4200-M	Skills Gap Assessment Form	Form for assessing the immediate training needs of new hires, or existing employees transferred or promoted into new positions		?	
OO-ALL-3940-R	Orientation Presentation	Presentation template for orientation of new hires			

Prepare for New Hire – HR

➤ HR

Step 1. Remove job posting

Remove the job posting filled by the new hire from the company website and any other external advertising sources. Advise **CUSTOMIZER: Example - Website Administrator** to update the position status on the website as “This position has been filled.”

Step 2. Set up employee files

Set up **CUSTOMIZER: electronic and/or paper HR files** for the new hire. Prior to their first day of work, ensure you have received and filed the new hire’s sign-off on contract documents.

This signed paperwork is crucial. If you received the new hire’s contract acceptance confirmation via email, have them sign printed copies on the first day of work.

Step 3. Communicate administrative preparation tasks

1. As soon as a candidate has accepted and signed an offer with a concrete start date, alert the following people as each one plays a part in preparing for the new hire’s arrival:

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Example Email Script – Preparing for New Hire

Subject line: <New Hire Full Name> starts on <start date>

<New Hire Full Name> is our new <position title> starting <start date>.

- <First Name>'s status is: <Enter: Regular full-time employment / Regular part-time employment / Temporary full-time employment / Temporary part-time employment / Independent Contractor / Consultant>
- <First Name> <is/is not> eligible for vacation and other paid time off benefits.

To prepare for <First Name>'s arrival, please perform the actions assigned to your role in the attached New Hire Preparation Guide.

New Hire Orientation Schedule – First Day

I have drafted up a suggested orientation schedule for <New hire first name>'s first day. If your role is listed, please reserve the time in your calendar assigned to you to meet with <New hire first name> and go over the items assigned to you in the attached New Hire Preparation Guide. If you are not able to be available at the time requested, please get back to me with an alternate time that works for you.

1. Hiring Manager: 9:00 am to 9:30 am – Introduce new hire to staff
2. Office Administrator: 9:30 am to 10:00 am – Facility tour and office services info
3. IT Administrator: 10:00 am to 10:30 am – Computer set up and network practices
4. <HR Manager or individual responsible for Company onboarding>: 10:30 am to noon – Orientation presentation, contracts, forms, questions
5. Hiring Manager: Lunch with <New hire first name> at 12 noon

Confidentiality

The purpose and timing of this email is to make sure we're well-prepared for the new hire's arrival. All information it contains is confidential until communicated publicly by senior management or HR. The new hire may not yet have communicated their decision to join the Company to their circles, therefore, this information should not be shared with others.

Thank you for your cooperation and help. We look forward to welcoming <New hire first name> to the Company!

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Example Email Script – Temporary or Term Employees and Contractors

Subject line: Determine status for <New Hire Full Name> contract ending <date>

Staff members working for the Company must always have a valid signed contract in place. <New Hire Full Name>'s contract expires on <date>. Please communicate with HR if you intent to extend the contract or it will be assumed that the contract will end on that date, triggering the action items outlined in the *DP-ALL-4610-M. Staff Departure Checklist*.

Step 5. Prepare for Orientation meeting

1. Make sure you have an Orientation meeting scheduled in your calendar for the new hire's first morning at work.
2. Order snacks and beverages for the Onboarding meeting.
3. Prepare the 'new hire kit,' which includes CUSTOMIZER: insert items in new hire kit. May include : company swag, tissues, a snack bar, coffee mug, water bottle, and other items placed inside a tote bag.
4. Prepare printed materials for the new hire, ideally presented in a binder or folder:

Key take-away information

- Printed copy of the Orientation Presentation so the new hire can take notes
- Holiday/vacation schedule
- Company organizational chart
- Staff & Telephone directory
- *Employee Manual or Core Company Policies* document

Forms to be completed

- Benefits enrolment forms
- If the terms and conditions of the contractual offer documents were confirmed by email only, and Company and new hire signatures were not obtained:
 - Print the final 2 copies of the contractual documents sent by email that require signatures

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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.

Example Email Script – Announcing the New Hire

Subject line: Welcome <New Hire Full Name>

Please join me in welcoming <New Hire Full Name> to <Company Name> in the position of <Title> effective <Hire Date>.

<First Name> comes to us with number years of experience in <function duties> and has an extensive background in <job function>.

<First Name> reports to <me or Manager name> in our <location> office and will be working closely with the <teams> to ensure goals.

<First Name> is an avid <sport or hobby> and <insert some light or amusing information - without getting too personal>.

To learn more about <him/her>, check out <First Name>'s profile.

You will find <First Name> located near <proximity or area>. Please drop by and introduce yourself when you get the chance.

WELCOME ABOARD <First Name>!

Step 3. Prepare for first day

No matter how competent and capable, the new hire will be looking to HR and the Hiring Manager to provide structure and guide them through the first week. The key is preparation.

1. Contact the new hire to set the start time for their first day of work.
2. Send flowers or a fruit basket before the first day of work. The investment is worth every penny and shows preparation and care. It also engages the new hire's family members by sending something that everyone can enjoy.
3. Prepare to engage the new hire with your team:

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Step 1. Meet with new hire

1. Review the *OO-ALL-3940-R. Orientation Presentation* with the employee.
2. Present and review the printed materials binder/folder you have prepared (see above).
3. Before the end of the meeting, obtain signatures for:
 - a. Contractual offer documents, if applicable
 - b. Payroll and benefits enrolment forms

Step 2. Process paperwork

1. Scan the signed contractual offer documents and save in employee **CUSTOMIZER: Paper or electronic** file.
2. Forward the signed Payroll and benefits enrolment forms to Payroll & Benefits Coordinator

First Day – Manager

▶ MANAGER

As the new hire's manager, you have an important role to play in mitigating the one thing that every new hire fears: awkwardness. If you get the first day right, the new hire will never forget it.

The most important times of a new hire's first day are the first hour, lunch time, and the end of the day. Make sure you are with the new hire during those times.

It is also important that you don't send out signals of stress, or that spending time with the new hire is a nuisance. We cannot underestimate the importance of showing genuine concern and sending the clear message that the new hire is important.

Step 1. Welcome new hire

1. Adhere to the morning orientation schedule.
2. Introduce the new hire to co-workers, team members, and key stakeholders.
3. Review the prepared agenda for the first week with the new hire.

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Step 3. Assign work

1. Discuss the probationary period and performance expectations, and set objectives. Refer to Process Guide for Managers - Probationary Periods.
2. Keep the employee busy and put them to work right away. Be prepared for them to have a full schedule from day one.
3. Ask about the employee's needs and work style, and how you can help. For example:
 - What do you feel you already know?
 - How can I help you get started?
 - What kind of programs/processes did you use on your last job?
 - Is there training you think you will need?
 - What can I as your manager do to ensure your success?
4. Show them where to find HR Resources.
5. **CUSTOMIZER: Insert Health & Safety overview or training requirements if applicable**

Step 4. Identify skill gaps

1. Work with the new hire to complete the Skills Assessment Gap form you prepared for them.
 - Be realistic and specific about what the job requires
 - In the training plan, prioritize bridging gaps that will help the new hire successfully complete the probationary period
2. Sign and submit the completed form to **CUSTOMIZER: HR or position title that approves training plans.**

Step 5. Touch base

Welcoming the new hire is a day-long process. The message, *"I'm glad you're here,"* needs to be conveyed over and over.

Throughout the day, touch base with the new hire as often as possible. Answer questions, make them feel comfortable and supported. Toward the end of the day, meet with them or grab a coffee to discuss how the day went and answer questions.

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