

Onboarding Guide for UMB Schools and Units



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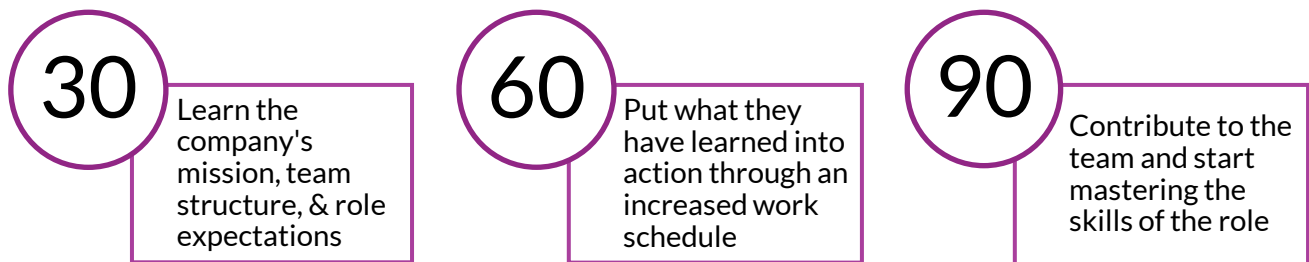
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Onboarding Guide for UMB Schools/Units

An effective employee onboarding provides new employees with a positive impression of employment with UMB and greatly impacts the new employee's motivation, productivity, and job satisfaction. An employee who gets off on the right foot is more likely to have better engagement, job performance, and to want to stay on the job longer.

While Central Human Resources plays a role in ensuring they have received all relevant benefit information, forms and general university information, the school/unit, managers, and supervisors of new employees should "own" the onboarding process.

This guide is designed to help, HR professionals and supervisors to plan and successfully implement the processes through which new employees become fully oriented to the University of Maryland, Baltimore (UMB), school, department, and work group. Generally, the onboarding process for new employees takes 18 months. However, the first 90 days are essential to establishing positive and engaging work experience. The graph below describes what takes place for the employee over the first 90 days:



The supervisor has a significant opportunity to influence the success and satisfaction of employees at University of Maryland, Baltimore (UMB). The new employee's first few days establish the foundation for a positive relationship between the new employee and the university through the school, department, or unit. As the most significantly influential person in the workplace, the supervisor will provide a substantial level of support and direction.

The guide provides information on:

- HR Professional / Supervisor Onboarding Checklist
- "Before the New Employee Arrives" Checklist
- Day 1 - Central Human Resources Onboarding
- Day 2 - School/Unit Onboarding - sample schedules
- Supervisor-Employee Meeting Checklist
- Work Buddy Assignment System
- Onboarding Evaluation Survey Questions

Employee Onboarding Checklist for HR Professionals and Supervisors

Employee Onboarding Checklist for HR Professionals and Supervisors

Activities	Responsible Person	Resource(s)
After An Offer Has Been Accepted		
Notify interviewees not selected for the job.		
Prior to The First Day		
Send a welcome email or call one week prior to onboarding to confirm: (start date, time, and where to report, how to get to campus, office address, parking pass options, first day/week schedule)		
Confirm and reconfirm expectations about the daily start and end times for work.		
Submit new account set-up form to help desk/CITS (for email set up /computer set up).		
Once you receive employee email address and credentials: email important and regular calendar appointments; add employee to required department systems, applications, distribution lists (i.e., department shared folders, SharePoint).		
Send email to campus telephones services to change/initiate name on phone line (caller ID).		CITS Telephone Service email: Sdtelecom@umaryland.edu
Determine if office keys are needed and, if so, work with HR representative or designee to acquire.		
Assemble welcome folder that includes campus map to new hire for the first day, driving directions, parking information.		
Determine if cell phone is needed, order and arrange for activation and set up through CITS.		
Schedule time with CITS for phone setup/cell phone activation login details		
Prepare workspace for new employee, ensure sufficient office supplies, computer equipment, office chair, keys, and telephone access.		
Begin to schedule meetings with key contacts across campus for employee's first few weeks.		
Compile a list of key documents (organizational chart, department contact list, office map, strategic plan, time and labor instruction etc.)		

Activities	Responsible Person	Resource(s)
Compile and schedule a list of the events, meetings, priorities the new hire should focus on over the next 2-3 months.		
Create an agenda for the employee’s first week of work.		
Determine who will be available to meet the new when they arrive; schedule dedicated time on your calendar the first day/week to spend with the new employee. Schedule an end day/week check-in meeting.		
Designate a work buddy for the new employee.		See: Buddy System (p.22)
Develop a 30-day onboarding schedule; schedule time to discuss schedule that includes: school/unit strategic plan, high priority areas that need to be addressed, meetings with key stakeholders, community partners, key staff and team members.		
Schedule technical training as necessary.		
Inform employee of the reporting instructions after HR Onboarding: <ul style="list-style-type: none"> • Report to the department/unit after Onboarding • Report to the department/unit on Day 2 		
Send email welcome announcement to your department staff. It should include the employee’s name, starting date, office telephone number, and a brief description of the employee’s background and other relevant information.		
Day 2 (Day after HR Onboarding)		
Schedule time with employee to meet with CITS activate and setup computer and phone equipment, outlook, People Soft (for time sheet access).		
Employee meets with Supervisor/designee to inform what is going to happen the first day and first week.		
Discuss/Provide an overview of pertinent topics: <ul style="list-style-type: none"> • UMB & School Strategic Plan, Core Values (and pledge) • Status reports, and accomplishments • Job description, remote work schedule, Review break schedule, call-out procedures, staff meetings, etc. • Important files, records, reports with status reports • Time and labor instructions • Applicable Technology training • School/Unit, Dept. Org Charts 		UMB Core Value

Activities	Responsible Person	Resource(s)
<ul style="list-style-type: none"> • Pay date and Holiday Schedule • How to view your paycheck. • Department list of employees, phone extensions, emails • Work attire • Review UMB emergency procedures. 		
Show the employee their personal workspace.		
Establish building/door access key is working.		Building Access System - UMB Police and Public Safety
Introduce new hire to coworkers, colleagues, and administrative staff, department head.		
Provide a tour of the school/unit (kitchens, copier room, bathrooms, emergency exits, etc)		
Ensure new hire was able to create UMID.		
Share instructions for phone use.		
Introduce work buddy.		
Check in with new hire at the end of day.		
During The First Week		
Review and discuss job expectations with the employee		
Discuss professional/career goals.		
Review how to complete timesheet		
Check-in with new hire for 10-15 minutes in the morning and at the end of the day.		
Discuss in more depth position duties and expectations. Define the job accurately and completely and be sure the associate understands their responsibilities. Although the employee may have seen a job description during the hiring process, it's time to go over it in detail. What does it really mean and how does their position impact others?		
Assign a manageable task within the first week to ensure the employee is not left doing nothing when there are gaps in the orientation. Make the job as manageable as possible and make conditions as predictable and as controllable as you can, until the new associate gets the rhythm of his or her work in your company. Be prepared to help the new hire sort priorities, at first.		

Activities	Responsible Person	Resource(s)
Help the new employee understand the University's and schools/unit unique culture. What's the dress code? When and how do people take lunch and other breaks? When and how do they get together to meet or solve problems? How strict are policies?		
Review features in MyUMB Home page and POSC.		
Review probationary period		Job Groups and Probationary Information
First 30 Days		
Confirm employee received instructions on how to access MyUMB and POSC.		
Remind employee to complete and return any benefit enrollment forms to HR.		
Explain chain of command.		
Assign job assignments and immediate priorities.		
Explain acronyms unique to the department.		
Discuss employees first month's experience with supervisor. Give feedback and provide opportunities for feedback.		
Discuss Performance Review Process. Make performance standards clear and let the employee know how his or her performance will be measured. -Includes providing info on performance expectations, goal setting, development, feedback, and timeline		Human Resources Policies PMP Process PMP Resources for staff
Meet with employee to assess progress and answer questions		
Discuss and obtain feedback regarding the assigned work buddy.		
Discuss training opportunities and confirm employee completed required training.		
Identify 30, 30, 90-day key goals, work assignments, and priorities.		
First 60 Days		
Review and discuss performance and development goals.		
Discuss how things are going with the assigned buddy.		
Continue facilitating relationship building and socialization.		
First 90 Days		

Activities	Responsible Person	Resource(s)
Discuss employee’s first three months experience with your supervisor.		
Review any other information necessary for the position with employee.		
Receive positive and constructive feedback.		
Ongoing (Throughout the Year)		
Discuss how employee’s expectations of this position fit the reality of the position.		
Discuss what has been working, what has not, what they need more of, etc.		
Set goals and expectations for the coming quarters/year.		
Continue to provide feedback and welcome input in return.		
Request feedback on Onboarding process and share improvement ideas with HR.		

Before The New Employee Arrives Checklist

Before The New Employee Arrives Checklist

Orienting a new employee is a process that can last up to a year, depending on the new employee's job and their prior experience. What happens between the offer letter and that first day depends on planning and communication that assures a memorable welcome and alleviation of a new employee's natural anxiety.

The new employee's first day may be filled with such thoughts as, "Will I be successful? Will I fit in?" Supervisors and managers can aid with answering these questions. Ensuring the workspace is ready for the new hire, clarifying departmental organizational structure, and communicating your expectations are fundamental during this time, as is success in the employee's first assignment.

Here are few activities to get ready you for the new employee:

1. Welcome and Initial Activities

- Plan welcome activities, including who will participate and what they'll do.
- Plan a welcoming get-together appropriate to your work group or place.
- Provide coffee and donuts to welcome the employee on their first day.
- Consider assigning a buddy for the new employee. Orient the buddy and include a description about the buddy's role in the pre-arrival information.
- Plan the employee's first lunch, including who will participate.
- Plan a tour of your facility and area.
- Send an announcement of the employee's role and arrival to everyone who will be working with him or her; send a copy to the employee.
- Add the employee's name to contact, routing, and distribution lists.
- Create a "Contact" card that provides the names, phone numbers and email addresses of people the new hire will work with on a regular basis.
- Clear your schedule to be available to the employee on the new hire's first day. Plan to begin and end the day with him or her.
- Plan for the employee's first assignment to be a success that sets the pattern for productive supervisory-employee interaction.

2. Prepare the Workspace

- Be sure the workspace is clean and operational, including required equipment and supplies. Note computer equipment and phone orders may take 2-3 weeks prior to the new employee's arrival.

- ❑ Arrange for identity markers such as name plates and business cards to be ready when the employee arrives. Before ordering, check with him or her about preferred usage (use of name, other options).
- ❑ If the new employee has requested workplace accommodations, complete the form [How to Request Accommodations for Employees](#).

3. Questions a New Employee May Have

- ❑ Inquiry is the foundation of a higher education institution, so do not feel awkward when a new hire asks questions about their new job before starting. It is best to be prepared to answer these common questions or provide the information to the new hire:
 - A. Who should you contact if you have questions before you start?
 - B. Encourage questions to help the new hire feel less stressed about the first few days, such as:
 - Should the new hire bring lunch on their first day?
 - If commuting by car: Where does the new hire park on the first day/how will it be paid for?
 - If commuting by rail or bus: Where is the closest bus, rail, and UMB shuttle stops?
 - If commuting by bicycle: Where is the bicycle rack closest to the building?
 - Should the new hire report to the office after the 1st day onboarding session or are they permitted to go home?
 - What time should the new hire be at work the second day?
 - What is the preferred attire in the group/department?
 - What is the accepted practice for decorating their workspace; such as photos from home or other personal items?
 - What is the schedule for the first days, such as for meetings or required training?

Central Human Resources Onboarding Schedule

Day 1: Central HR Onboarding Schedule

On the first day of employee, new hires attend the one-day onboarding session facilitated by central HR. The day includes the collection of HR paperwork, presentations, and lunch. A sample schedule is below:

(Effective: 2026-03)

Presentation	Responsible Dept.	Time
Greet new hires and send them to onboarding room	Lobby Greeter	8:30-9:15 am
Check-in and Collection of 1-9 forms /Return Employee documents	Raymond/Service Center Staff	8:30-9:15 am
Culture Presentation	ELD	9:15 – 09:40 am
Core Value		9:40 – 10:15 am
BREAK Hand out One Cards, take pictures/ Parking Vouchers / Payroll Form Follow up	HR Service Center & OED Staff, Raymond & Payroll Reps	10:00 - 10:15 am
DEI Presentation	DEI Rep	10:15 - 10:40 am
Parking & Transportation Presentation	P&T Rep	10:45-11 am
Police & Public Safety	Public Safety	11 – 11:15 am
IT Resource	IT Rep	11:14 – 11:45 pm
LUNCH Union Talk for Non-exempt regular staff		11:45-12:30
Benefits Part I-Health Benefits and SRA's	Benefits Staff	12:30 - 1:45
BREAK Excuse Contingent staff		
Benefits Part II-Mandatory Retirement	Benefits Staff	2-3pm

Day 2: School/Unit Onboarding

While Central Human Resources plays a role in ensuring they have received all relevant benefit information, forms and general university information, the school/unit, managers and supervisors of new employees “owns” the onboarding process from day two and beyond.

After the new employee completes a successful first day of day 1 onboarding, they are excited and ready to learn more about their physical work environment, work culture, co-workers, and other work-related information. Crafting a day two- and first-week schedule will be helpful in managing information flow and reduce the sense of overwhelmingness for the new employee.

These activities are critical to the acculturation of the new employee. With new employees eager to jump into all aspects of their new job, add “down time” to their schedule. This will give time to explore their work and review information they have been given. Additionally, if allowed within your department, consider providing the new employee a small welcome gift, such as:

- A memento related to UMB (t-shirt, mug, magnet, book, or another UMB-specific item)
- A memento related to the school, department or work group

In preparing for Day 2 School/unit onboarding, the suggested core topics below are ideal for new hires to receive the pertinent information about their respective work area. As an added resource checkout HR’s [Current Employees](#) webpage.

Day 2: Suggested Core Topics

Topics	Focus Points
Arrangement for computer and system access	<ul style="list-style-type: none"> • Email • Duo multi-factor authentication • Include on applicable list servs and meeting invitations
School/Unit Overview	<ul style="list-style-type: none"> • Mission & Vision • Strategic Plan • Academic Program • Leadership • Departments • Organizational Chart • Communicate Work Buddy
School/Unit Branding & Communication	<ul style="list-style-type: none"> • Guidelines • Website • UMB Communications • Campus Alerts

<p>School/Unit Human Resources & Payroll Services</p>	<ul style="list-style-type: none"> • Employee Benefits Summary Sheet • Timekeeping Expectations & Timesheets • Leave Plans • Payroll (POSC access) • HR Policy Library • Holiday Calendar • Required Employee Training • Essential Employees <ul style="list-style-type: none"> ○ Emergency Conditions ○ Closure, Delayed Openings • Important Contacts (phone numbers and email addresses) • Employee photo for unity/department director/webpage • Telework Policy/Agreement • Faculty/Staff Senate • Employee Assistance Program Information
<p>Building Safety & Access</p>	<ul style="list-style-type: none"> • Emergency Plan • Evacuation • Active Shooter Response • Safety Kits / Stop the Bleed • Automated External Defibrillators (AEDS) • Building Access
<p>Parking & Transportation</p>	<ul style="list-style-type: none"> • Parking and Transportation Services
<p>School/Department Tour</p>	<ul style="list-style-type: none"> • Kitchens, copier/mail room, bathrooms, emergency exits, etc)
<p>Employee Work Area</p>	<ul style="list-style-type: none"> • Ensure workspace sufficient office supplies, computer equipment, office chair, keys, and telephone access

Sample: Day 2 Onboarding Schedules (General)

Morning

- Greet employee, introduce him or her to workspace including where personal items are put (coat rack, locker, etc.).
- Provide facility access information, security information, and keys.
- Provide and explain the schedule of the day, with times and locations included.
- Answer immediate questions the employee may have.
- Introduce the employee to co-workers (and to buddy if assigned).
- Provide a tour of the immediate facility (give personally or assign buddy or another co-worker).
- Give the employee some time to get acquainted with his or her workspace.

Lunch

- Carry out a pre-arranged plan for lunch with you and/or others, if feasible.

Afternoon

- Arrange for employee to establish computer and computer systems (UMID, UM Alerts, e-mail, calendar, etc.), telephone, other systems he or she will use.
- Arrange for the employee to receive instructions and codes for copier, fax, and other machinery he or she will use.
- Meet with employee: review the day, answer questions, and provide and explain schedule and activities for the next several days.

Sample: Day 2 Onboarding Schedule (Facilitated)

Time	Topics	Presenter
8:45 am – 9:00 am	Continental Breakfast	
9:00 am – 9:15 am	Welcome & Introductions	HR Representative
9:05 am – 9:15 am	School Overview <ul style="list-style-type: none"> • Mission & Vision • Strategic Plan • Academic Program • Departments 	Senior Leadership
9:15 am – 9:30 am	School Branding & Communication <ul style="list-style-type: none"> • School Branding & Communication Guidelines • Website • UMB Communications • Campus Alerts 	
9:30 am – 9:45 am	Parking & Transportation	HR Representative
9:45 am – 10:45 am	School Human Resources & Payroll Services <ul style="list-style-type: none"> • Employee Benefits • Time & Leave • Payroll • Employment Verifications • Required Employee Training • eLearning/LMS • Essential Employees • Important Contacts • C2 Contract/Hourly NH Paperwork Review 	HR Representative
10:45 am – 11:15 am	New Employee Directory Photo	HR Representative
11:15 am – 12:30 pm	Department Tour	HR Representative

Sample: Day 2 Onboarding Schedule (PowerPoint Slide Deck)

As an additional option to a structured schedule to orient new employees on day two, one may want to prepare a PowerPoint presentation of the significant information for the new hire to review. The presentation can also serve as a stand-alone option for the new hire.

Here are guiding points on what to include in the slide deck.

Topic Focus

1. Welcome to X (include an image and names of the presenter(s))
2. Executive Leadership (include images)
3. Mission
4. Vision and Purpose
5. Overview of school/department/unit (include history, interesting facts, work areas)
6. Building Access
7. Computer and email login
8. DUO multi-factor authentication
9. Telework
10. Payroll (POSC, forms, direct deposit, schedule)
11. Holiday Calendar
12. Filling out Timesheet
13. Earned Leave
14. State Personnel System (SPS) Workday
15. Required Trainings
16. Faculty and Staff Senate

Sample: First Week Onboarding Schedule

Day	Activity	Responsible Person	Time
Monday	New Employee Onboarding Session	Employee	8:30 am – 3:30 pm
Tuesday	Review HR related items – timesheet, leave, payroll, holiday, computer equipment, etc.	HR Representative	9 – 10 am
	Review job description, expectations, goals, work hours, telework days, etc.	Supervisor	11 am – 12 pm
	Meet Onboarding Buddy	Onboarding Buddy	1:00 – 1:30 pm
	Tour the department area	HR Rep / Supervisor	Mutually Agreed Time
Wednesday	Discuss initial work assignments and projects, required meetings/committees	Supervisor	9:00 – 10:00 am
	Review University/Department Links: <ul style="list-style-type: none"> • UMB Strategic Plan • Division Strategic Plan • Core Values Commitment Pledge 	Employee	Flexible
Thursday	Review USM Policies: <ul style="list-style-type: none"> • Sexual Harassment • Non-Discrimination & Equal Opportunity • Employee Development for Nonexempt & Exempt Staff • Probation for Regular Nonexempt & Exempt Staff • Tuition Remission for Faculty & Staff • Telework 	Employee	Flexible
Friday	Supervisor Check In	Supervisor	Mutually Agreed Time

Supervisor-Employee Meeting Checklist

Supervisor-Employee Meeting Checklist

The initial supervisor-employee meeting is a significant opportunity to discuss essential information to ensure the employee will be successful. Discussion points for the meeting may include:

- Supervisor's expectations and management style
- Employee job description and other essentials for success
- Organizational mission, vision, current goals and priorities
- Organization chart(s) and staff list(s)
- Schedule for the first week and beyond
- Buddy assignment, if appropriate
- Initial work assignments
- Required department trainings
- Performance Review process

The Supervisor-employee meeting during the first week is also a time to discuss and clarify the first assignment(s) for the new employee. Here is a checklist to assure a successful first assignment(s):

The first assignment is crucial in at least two ways:

- It can give the employee a successful start, and
- It can help establish productive supervisor-employee interaction

Explain the expected outcome(s) of the assignment.

- What will exist as a result of the work? What will be created or changed?
- What will the result look like? (Show demonstrations or samples if workable.)

Define a SMART objective.

- Identify specific, measurable, attainable, relevant and timely goal

Explain the importance of the outcome(s).

- Where do the results fit in the larger organizational picture? (mission, goals, priorities.)
- Who will benefit from the results?

Describe the key aspects of the assignment.

- What actions or steps does it require?
- What are the expected levels or measures of success?
- What resources or resource limits apply?
- What are the deadlines?
- What is the priority of the assignment for the employee?

Define the level of authority with which the employee will begin the assignment.

- Carrying out exact instructions?
- Bringing recommendations to be decided by you?
- Bringing recommendations to be decided by you and the employee together?
- Making decisions, informing you before acting?
- Making decisions, acting, then informing you?

Develop a communication plan to use throughout the assignment.

- How will you and the employee exchange information?
- What kinds of reports will the employee make, and when?
- How will you monitor progress?

Let the employee know how you will inform other parties about the assignment.

- Who can influence success?
- With whom will the employee need to consult with?
- From whom will the employee need to get resources from?

Identify potential problems and how they'll be addressed.

- What could interrupt or get in the way of success?

Work Buddy System

Work Buddy System

Assigning a work buddy supports the acculturation of the new employee. The buddy partners with the new employee to offer observation and insights into how to better understand the organization's process. Typically, the buddy experience is the first few months of employment. It is encouraged for the supervisor to set specific start and end dates for the buddy experience.

What is a buddy?

A buddy is an experienced employee who partners with a new employee to provide guidance and encouragement during a defined period, typically the first two to three months of employment. A buddy is not a mentor who supports an employee's career growth, or a coach who works with an employee's job skills, or in any way a substitute for the managerial role – buddies have no involvement in the new employee's performance or development.

What does buddy do?

A buddy helps reduce new employee uncertainty by being available to answer immediate or routine questions. A buddy relates new employee information to actual situations. A buddy can suggest experiences and provide information to help the new employee become an "insider".

How is a buddy assignment structured?

A buddy is generally expected to establish a rapport with the new employee, meet face-to-face or virtually for 15- 30 minutes weekly, during work hours, to answer any questions the new hire may have or discuss workplace culture. (Support can be continued beyond the defined period if appropriate and useful.)

Who is a successful buddy?

To be a buddy, an employee should know and be committed to the department or work area and to UMB at all its levels, understand the culture, have good interpersonal skills, is a respected performer and role model, possesses a full understanding of the university and work environment, can be a peer of the new employee, and want to help. A buddy should have or be given time to support the new employee.

Assure the success of the buddy relationship by clarifying purposes and expectations of the buddy role; you might use or adapt information for the new employee/buddy relationship when you orient the buddy.

Buddy System: Responsibilities & Expectations

Information for the New Employee/Buddy Experience

New Employee Name:

Job title:
Telephone:
Email:
Date of Arrival

Buddy Name:

Job title:
Telephone:
Email:
Date of Arrival

General Responsibilities

- Exemplify the Core Values of the University
- Provide employment-related support to the new employee with the intent of helping him or her settle into the culture of the new work environment.
- Help the employee socialize with peers, joining them for lunch, etc.
- Partner with new employee to provide guidance and encouragement for the first two months of employment.
- Reduce new employee uncertainty by being available to answer immediate or routine questions.
- Suggest experiences and provide information and resources to help the employee become an insider.
- Provide a safe environment for the new employee to ask questions and learn new processes.

Specific Expectations

- Be prepared to answer general questions about the UMB community or how the work group functions. The Buddy should only answer questions related to employment conditions, work assignments and career opportunities.
- Identify questions which the new employee should direct to the supervisor or manager.
- Meet the new employee on the second day and be involved in introductions to the physical environment and the work group. Establish rapport.
- Meet in-person or virtually with the new employee for 30 minutes weekly during working hours for the first few months of employment.
- Be available to answer immediate or routine questions.
- Provide helpful tours, taking the new employee to important or interesting locations during the first few days.
- Customize experiences to the new employee's needs and interests; help the new employee to apply his or her learning and experiences to the realities of the work group.
- Be positive and encouraging.
- Maintain confidentiality.

Onboarding Evaluation Survey Questions

Onboarding Evaluation Survey Questions

As mentioned before, the onboarding experience is essential to new employees and their acculturation to UMB. To gain a better understanding of the new hire's onboarding experience, the development of an onboarding survey is ideal. Through a survey, the school/unit can gain specific feedback regarding the new hire's experience.

Below are suggested questions to incorporate into an electronic onboarding survey:

Onboarding Day 2

Prior to the first day

1. Did the department/unit email provide you with the necessary information to prepare you for the first day?
2. Is there something we could have done differently?

Onboarding Experience

3. Overall, how would you rate your onboarding experience?
4. What was your favorite part of the onboarding process?
5. Were there parts of onboarding that was confusing or unclear?
6. How do you feel about the onboarding materials? (e.g., presentation, handbook,)
7. Do you feel like you have all the tools and resources to perform your job successfully?
8. Do you feel like the onboarding process has prepared you for your role?

30,60, 90 Day Onboarding Follow Up

Meeting with Supervisor

9. How relevant have your role-based conversations been with your supervisor?
10. How relevant have your career-oriented conversations been with your supervisor?
11. Do you have a clear idea about what is expected of you at this job?
12. Do you understand how your role contributes to the overall business goal?
13. Do you have any questions about your responsibilities or our policies?

Engagement

14. How valued do you feel at work?
15. How proud are you to work for our university?

General

16. What can we do to help you do your job even better?
17. Did we miss anything in the process, or was there anything you didn't like?
18. What changes would you recommend to the onboarding process?