



ONBOARDING CHECK-IN GUIDE

As successful onboarding is an intentional, thoughtful process it requires conversations between supervisors and new staff. It sets the foundation for prepared and effective employees, who we hope become long term staff.

We offer this guide to assist supervisors as they engage in these significant discussions with their new staff. We suggest scheduled 30, 60, 90 day, 6 month and 1 year check-ins as a best practice strategy to ensure these moments of significant conversation do occur.

To maximize the positive impact of these meetings and their connection to the onboarding process, these meetings should be scheduled prior to a new employee's hire date or immediately upon arrival. Check-in meetings should be considered a top priority. While there is understanding that a cancellation or reschedule may be needed, those instances should be extremely rare and only in urgent, unavoidable situations. If a reschedule is needed, be certain to have a new date set when the reschedule notice is made. Please avoid multiple reschedules of any kind.

These meetings should be conducted as two-way, conversations intended to share information. Take care to create a dedicated, undistracted environment where all attention can be given to the check-in discussions. Use this time to arrive at mutual understanding of the new hire's experience with their job to date. Check-ins should provide opportunity for you both to share experiences, perceptions and feedback.

As you share these thoughts please ground all feedback, both positive and constructive in evidence, to support clarity, understanding and tangible metrics for measuring future progress.

Understanding you will most likely be using your preference of Zoom or Teams for these check-ins, do so with your camera turned on. Please also consider the option of meeting in-person for check-in meetings, if possible. In-person time can strengthen your individual connections to remote workers, and help build strong relationships. Consider in-person especially for the 6 month and one-year meetings.

Finally, as you review this, please understand these are guidelines and are intended to shape your thinking about the importance and structure around periodic check-ins. They can help you plan these opportunities for significant conversations on key items. Use them to support the onboarding process but NOT as a prescriptive set of mandatory questions. Each employee and situation should be individually considered and each check-in meeting individually managed for that person. Complexity of job duties, and working relationships will alter each new employee's check-ins, focus areas and length of the onboarding process.

While these have been targeted to remote workers, they can easily be used for in-person new employees also.

30 DAY CHECK-IN MEETING-this is your first meeting and will set the stage for future meetings in this framework and the relationship that you are establishing with your new employee. It will be your first formal opportunity to share thoughts and create any needed learning goals for future examination.

ASK and LISTEN

- 1) Tell me about your first 30 days.
- 2) I have noticed you are making good progress in this/these areas.
 - a) Cite with evidence
- 3) Tell me about how you are using Zoom, Teams and email?
 - a) Are you and others staying in touch and receiving regular communication and information sharing?
 - b) Is there any need for function training?
- 4) Tell me what you see is working well and why?
 - a) Ask for areas, and evidence, in which they have seen success?
- 5) Tell me what needs attention or improvement and why?
 - a) Ask for ideas to support improvement?
 - b) Ask what steps you as leader can take to support improvement?
 - c) Ask if there are any job specific areas you can target for support?
 - d) Ask if there is an area that you may have underestimated the learning curve and why this has been challenging?
 - i) Reset thinking and set new goal.

SHARE YOUR FEEDBACK

- 1) Here are some specific areas that could be improved, and this is what I am looking for.
 - a) Provide evidence
 - b) Be clear with your expectations.
- 2) Ask for summary of expectations.
 - a) Confirm understanding or clarify
 - b) Repeat expectations, and ask again until understanding is achieved.
- 3) Do you have the resources and tools necessary to act on these expectations?

CHECK ON RELATIONSHIPS

- 1) Are you getting to know your team members?
 - a) Ask for evidence
 - b) Note and provide feedback to team as a group or individually as needed (note for APR).
- 2) How are things going with your buddy? (if they have one)
 - a) Note and provide feedback to buddy individually as needed (note for APR).
- 3) Describe the level and effectiveness of communication with needed team members.

ORGANIZATIONAL/DEPARTMENTAL INFORMATION

- 1) Do you have any questions about our department's structure or internal working relationships?
- 2) Any questions about the expectations regarding topics like attendance, dress code, computer use, etc.?
- 3) Any questions about your benefits package?

WRAP-UP

- 1) What information or thoughts have I overlooked or not addressed that you would like to discuss or still need from me?

60 DAY CHECK-IN MEETING-as your second formal meeting, this is the opportunity to visit any goals set in the 30 day meeting or set new goals. You should reinforce any conversations that occurred then as well. Continue to recognize effective work, recognize progress toward goals and build your relationship with this conversation, by reviewing and refining goals clearly and effectively.

ASK and LISTEN

- 1) Tell me about the last 30 days.
- 2) I have noticed you are making good progress in this/these areas.
 - a) Cite with evidence
- 3) Tell me what you see is continuing to work well and why?
 - a) Ask for areas, and evidence, in which they have seen continued success?
- 4) Tell me about how you are using Zoom, Teams and email?
 - a) Are you and others staying in touch and receiving regular communication and information sharing?
 - b) What lingering questions do you have for any function training?
- 5) Tell me what may still need attention or improvement and why?
 - a) Ask for ideas to support improvement?
 - b) Ask what steps you as leader can take to support improvement?
 - c) Ask if there are any job specific areas you can target for support?
 - d) Ask if there is an area that still challenges our learning curve?
 - i) Reset thinking and set new goal.

SHARE YOUR FEEDBACK

- 1) Here are some specific areas that could be improved, and this is what I am looking for.
 - a) Provide evidence
 - b) Be clear with your expectations.
- 2) Ask for summary of expectations.
 - a) Confirm understanding or clarify
 - b) Repeat expectations, and ask again until understanding is achieved.
- 3) Do you have the resources and tools necessary to act on these expectations?
- 4) Take time needed to revisit any goals set during the 30 day meeting.
 - a) What worked well
 - b) What still needs attention
 - c) What support can you provide to ensure success meeting goals?

CHECK ON RELATIONSHIPS

- 1) Are you continuing to learn more about your team members?
 - a) Ask for evidence
 - b) Note and provide feedback to team as a group or individually as needed (note for APR).
- 2) How are things progressing with your buddy? (if they have one)
 - a) Note and provide feedback to buddy individually as needed (note for APR).
- 3) Describe the level and effectiveness of communication with needed team members.

ORGANIZATIONAL/DEPARTMENTAL INFORMATION

- 1) Do you have any lingering or new questions about our department's structure or internal working relationships?
- 2) Any concerns about the expectations regarding topics like attendance, dress code, computer use, etc.?
 - a) Provide your feedback
- 3) Any lingering questions for HR?

WRAP-UP

- 1) What information or thoughts have I overlooked or not addressed that you would like to discuss or still need from me?

90 DAY CHECK-IN MEETING—as your third meeting, this is another opportunity to visit goals set in previous meetings or set new goals. Reinforce any conversations that occurred as well. Recognize effective work, progress toward goals, review and refine goals clearly. Solidify your relationship by continuation of sharing information. Wrap up loose ends that still linger from prior meetings. At this time, your new employee may be learning more complex processes and refining the initial training they have received. Continue supporting their practice by focused additional development and facilitating the transmission of work area insight from supervisors and peers.

ASK and LISTEN

- 1) Tell me about the last 30 days.
- 2) I have noticed you are making good progress in this/these areas.
 - a) Cite with evidence
- 3) Tell me what you see is continuing to work well and why?
 - a) Ask for areas, and evidence, in which they have seen continued success?
- 4) Are there any lingering concerns with using Zoom, Teams and email?
 - a) Are you and others staying in touch and receiving regular communication and information sharing?
 - b) What lingering questions do you have for any function training?
- 5) How can I provide the best feedback for you?
 - a) More or less?
 - b) Clarity?
 - c) Timeliness?
- 6) Tell me what may still need attention or improvement and why?
 - a) Ask for ideas to support improvement?
 - b) Ask what steps you as leader can take to support improvement?
 - c) Ask if there are any job specific areas you can targeted for support?
 - d) Ask if there is an area that still challenges our learning curve?
 - i) Reset thinking and set new goal.

SHARE YOUR FEEDBACK

- 1) Here are some specific areas that could be improved, and this is what I am looking for.
 - a) Provide evidence
 - b) Be clear with your expectations.
- 2) Ask for summary of expectations.
 - a) Confirm understanding or clarify
 - b) Repeat expectations, and ask again until understanding is achieved.
- 3) Do you have the resources and tools necessary to act on these expectations?
- 4) Take time needed to revisit any goals set during the 60 day meeting.
 - a) What worked well
 - b) What still needs attention
 - c) What support can you provide to ensure success meeting goals?

CHECK ON RELATIONSHIPS

- 1) Are you continuing to learn more about your team members?
 - a) Ask for evidence
 - b) Note and provide feedback to team as a group or individually as needed (note for APR).
- 2) How are things progressing with your buddy? (if they have one)
 - a) Note and provide feedback to buddy individually as needed (note for APR).
- 3) Describe the level and effectiveness of communication with needed team members.

ORGANIZATIONAL/DEPARTMENTAL INFORMATION

- 1) Do you have any lingering or new questions about our department?
- 2) Any lingering questions for HR?

WRAP-UP

- 1) Provide a general overview of 6 month probationary review, and schedule.
- 2) What information or thoughts have I overlooked or not addressed that you would like to discuss or still need from me?
- 3) Set any additional meetings as needed.

REQUIRED 6 MONTH PROBATIONARY REVIEW- This meeting is a bit different than the others listed here. This is a required meeting in which a newly hired regular staff employee's work performance can be evaluated by their supervisor. Please look at [Policy HR0135](#).

This meeting is more formal in nature than other check-in meetings and a paper copy of the Probationary Period Performance Review Summary Form is sent to the supervisor by HR Records. The employee's status will move from *probationary* to either *retained* or *terminated* as determined by the supervisor. The form is completed by the supervisor, discussed with the employee, and filed back with the local HR office. If regular check-in meetings have occurred, feedback has been shared, and communication has been understood, there should be no surprises. Please check with HR if you have any questions regarding the form or required process for this review.

While this is a different type of meeting, discussions with employees who are being retained can still include topics like those mentioned earlier and below. Things like their perceived acclimation to their role and the department, status of relationships with colleagues and stakeholders. They should have competency in their basic essential roles and responsibilities. Take moments to follow-up on learning of more complex processes and refining any as needed. Take time to review the status of any goals still in process and set any new goals, as needed. Maintain support of their practice by identifying and encouraging engagement in any focused additional development.

ASK and LISTEN

- 1) Tell me about your last 3 months, since we last checked-in.
- 2) I have noticed you are making good progress in this/these areas.
 - a) Cite with evidence
- 3) Tell me what areas of your job you are most confident with?
 - a) Ask for areas, and evidence, in which they have seen continued success?
- 4) What talents or skills do you have that you feel you aren't using often enough in your current role?
- 5) How am I providing the best feedback for you?
 - a) More or less?
 - b) Clarity?
 - c) Timeliness?
- 6) Tell me what you believe may still need attention or improvement and why?
 - a) Ask for ideas to support improvement?
 - b) Ask what steps you as leader can take to support them?
 - c) Ask if there are any job specific areas you can targeted for support?
 - d) Ask if there is an area that still challenges our learning curve?
 - i) Reset thinking and set new goal.

SHARE YOUR FEEDBACK

- 1) Here are some specific areas that could be improved, and this is what I am looking for.
 - a) Provide evidence
 - b) Be clear with your expectations.
- 2) Ask for summary of expectations.
 - a) Confirm understanding or clarify
 - b) Repeat expectations, and ask again until understanding is achieved.
- 3) Do you have the resources and tools necessary to act on these expectations?
- 4) Take time needed to revisit any goals set during the 90 day meeting.
 - a) What worked well
 - b) What still needs attention
 - c) What support can you provide to ensure success meeting goals?

CHECK ON RELATIONSHIPS

- 1) Are you continuing to learn more about your team members?
 - a) Ask for evidence
 - b) Note and provide feedback to team as a group or individually as needed (note for APR).
- 2) How are things progressing with your buddy? (if they have one)
 - a) Note and provide feedback to buddy individually as needed (note for APR).
- 3) Describe the level and effectiveness of communication with needed team members.

ORGANIZATIONAL/DEPARTMENTAL INFORMATION

- 1) Do you have any lingering or new questions about our department?
- 2) Any lingering questions for HR?

WRAP-UP

- 1) Provide a specific overview of 6 month probationary review, and schedule, if necessary.
- 2) What information or thoughts have I overlooked or not addressed that you would like to discuss or still need from me?
- 3) Set any additional meetings as needed.

Your relationship and communication patterns should be well established by month 6, continue to build upon those. If you have taken the time to meet and have engaged in two-way conversations, you have helped set the stage for your employee's success. From here to the one-year mark communication must continue, and it is important you do not lose contact. While you do not find any recommendation for onboarding check-in meetings from 6 months and one-year, each individual situation is different so you and your new employee should assess that need together and take action to ensure that periodic and productive contact is maintained so the onboarding relationship that has been built does not suffer.

RELATED INFORMATION: The next required process is the Annual Online Performance Review (OPR). The OPR is an entirely different meeting and serves an evaluation of the employee's performance typically over a full calendar year. Please do not confuse the One Year Work Anniversary Meeting shown next with the OPR. Details on the OPR can be found [here](#).

ONE YEAR WORK ANNIVERSARY- One of the most crucial work practices is to be genuinely interested in your employees and their development. One way to show your employees how much they care is by celebrating important dates, like their work anniversary. The first anniversary is your employee's first interaction with how you treat employees as they progress through UT. Celebrating work anniversaries helps you foster employee loyalty while showing how much you care. Employees are always evaluating their work experience, especially during special times like this. Get your employees excited about what's to come by celebrating their big day. Please see below some great tips and questions to ask at your employee's one-year work anniversary meeting.

ASK and LISTEN

- 1) Tell me about the last 6 months.
- 2) I have noticed you are making good progress in this/these areas.
 - a) Cite with evidence
- 3) Tell me about how you are using Zoom, Teams and email?
 - a) Are they staying in touch and receiving regular communication and information sharing?
 - b) Is there any need for function training?
- 4) Tell me what you see is continuing to work well and why?
 - a) Ask for areas, and evidence, in which they have seen continued success?
- 5) Tell me what may still need attention or improvement and why?
 - a) Ask for ideas to support improvement?
 - b) Ask what steps you as leader can take to support improvement?
 - c) Ask if there are any job specific areas you can targeted for support?
 - d) Ask if there is an area that still challenges our learning curve?
 - i) Reset thinking and set new goal.

SHARE YOUR FEEDBACK

- 1) Here are some specific areas that could be improved, and this is what I am looking for.
 - a) Provide evidence
 - b) Be clear with your expectations.
- 2) Ask for a summary of your expectations.
 - a) Confirm understanding or clarify
- 3) Ask for summary of expectations.
 - a) Confirm understanding or clarify
 - b) Repeat 3, 3a if necessary, until understanding is achieved.
- 4) Do you have the resources and tools necessary to act on these expectations?
- 5) Take time needed to revisit any goals set during the 6-month meeting.
 - a) What worked well
 - b) What still needs attention
 - c) What support can you provide to ensure success meeting goals?

CHECK ON RELATIONSHIPS

- 1) Are you continuing to learn more about your team members?
 - a) Ask for evidence
 - b) Note and provide feedback to team as a group or individually as needed (note for APR).
- 2) How are things progressing with your buddy? (if they have one)
 - a) Note and provide feedback to buddy individually as needed (note for APR).

ORGANIZATIONAL/DEPARTMENTAL INFORMATION

- 1) Do you have any lingering questions about our department?
- 2) Any lingering questions for HR?

EXPRESS GRATITUDE

Your new employee has now devoted a year of their professional life to your team. Even if they have room to improve, this is still worth recognizing and appreciating. Be sure to end the conversation by thanking them for their time and dedication to UT. To show your gratitude you can:

- Have a card signed by team/department members with a gift card
- Take them to lunch
- Give some UT swag items