Onboarding Processes and Tips for Remote Employees

At Georgia Tech Human Resources (GTHR), we are always excited to welcome a new employee to Georgia Tech. Due to social distancing requirements, we have been exploring creative ways to limit in-person contact and exposure for human resources staff and new employees. Below we have described step-by-step options you may want to consider as you onboard your new employees.

Please note: This guidance is for onboarding new employees in positions where remote work is an option.

Prior to New Employee Arrival

- **Schedule an appointment** for the new employee to visit GTHR within their first three (3) days of employment to complete the new-hire processing. *Note: GTHR has adjusted hours of operation during this time, reflected in available appointments.*

- Determine equipment and applicable software/systems access required for remote work. Contact ServiceNow for new employee’s equipment request and set-up. Consider the following resources and complete necessary documentation:
  - **Equipment**:
    - Laptop/Desktop
    - Computer Monitors
    - Telephone/Cell Phone
    - Printer(s)/Scanner(s)
    - Other applicable hardware
    *Note: Per the Georgia Tech Flexwork Arrangements policy, an Equipment Loan Agreement form is required for remote business operations. Managers should submit the completed form to their department’s property control coordinator and/or a copy of the form may be uploaded to the associated ServiceNow request ticket.*
  - **Software/systems access**:
    - General/Institute-wide systems
    - Department/unit/team specific systems
    - Employee/position specific systems
    *Note: A “New Employee Systems Access Checklist” template is available for your use*

- Create a Training Plan for the new employee with all required and recommended training courses they will attend or complete during their onboarding period; these can include:
- **New Employee Experience** “Welcome to Tech” (specific directions will be provided by GTHR’s Workplace Learning & Professional Development team)
  
  **AND/OR**

- **New Faculty Orientation** scheduled each August ([RSVP form](#)), **Teaching Kickoff** workshops, and Extended Orientation Programming
- **New Hire Learning and Compliance** (within 30 days of hire date; email sent to new employee)
- New Employee Experience “**Managing Your Performance the Georgia Tech Way**” (within three months of hire date)
- New Employee Experience “**Seizing Your Career the Georgia Tech Way**” (within six months of hire date)
- **OneUSG Connect** training, based on position and/or role in the OneUSG Connect system (assigned trainings will be visible to the new employee after logging into [training.hr.gatech.edu](http://training.hr.gatech.edu) with their GT credentials)
- **Data Management: Security Fundamentals** training
- Department/unit/position specific training (e.g. safety, financial, human resource, research, faculty)
- Classroom training, [online learning](#), and one-on-one instruction
- **Note:** A "**New Employee Training Plan**” template is available for your use

**• Prepare a welcome packet for the new employee to include:**

- Organizational chart(s) for team and department/unit
  - Include Institute charts
- Mission/Vision/Guiding documents for team and/or department/unit
  - Include Institute Strategic Plan
- Contact names and phone lists for team and department/unit
- Contact names and phone lists for partners outside the department/unit (as applicable)
- Documentation specific to the new employee’s job, duties, and responsibilities
- Six-month **Probationary Period** (provisional appointment) information (as applicable)
  - Include Review for Probationary Period form
- Department/unit specific policies and procedures
  - Include applicable Institute policies
- Department/unit **flexible working arrangements** information
- Systems Access Checklist
- Training Plan
- Institute and/or department/unit specific “spirit” items (e.g. shirt, sweater/jacket, portfolio, bag), as available/applicable. Other options could include desktop screen savers and wallpaper downloads for computers and cell phones. **Note:** Ensure adherence to the **Purchase of Gifts for Employees/Students** policy
• Inform all team members, department/unit leadership, and other key stakeholders, of the new employee’s start date, along with basic information about them (e.g. name, job title, job duties and responsibilities, bio)

• Schedule date and time for all team members to meet the new employee through a virtual meeting; consider:
  o Welcome breakfast/lunch
  o Team meeting
  o Team “event”
  o Note: Ensure adherence to the *Procurement of Group Meals for Employees, Students, and Official Visitors* policy

• Assign a “buddy/partner” for the new employee to serve as a resource for general questions about the department/unit and Institute, and provide guidance on systems and processes used in their work:
  o Determine how often they will meet (e.g. once a week, once every two weeks, once a month) and the tool they will use to meet (e.g. WebEx or BlueJeans)
  o Determine how long this relationship will formally last (e.g. first month, first three months, first six months, or longer)
  o Establish some formal meetings/events for the new employee and their “buddy/partner” (e.g. virtual lunches or breakfasts, meetings, and possible virtual “tours”)

• Schedule initial time for new employee to meet with their assigned “buddy/partner;” this can include:
  o Breakfast/lunch
  o Special meeting(s)

**Within New Employee’s First Week**

• Ensure new employee visits GHTR during their previously scheduled appointment time for new-hire processing
  o Ensure they complete all onboarding paperwork online prior to their scheduled appointment and bring *proof of identification*, which is required by Federal law, for *Electronic Form I-9* completion

• Work with your department’s HR Business Partner, Director, or Representative to submit a request for the new employee’s *BuzzCard*, using new tools and processes implemented by the BuzzCard Center office
  o [Check their website](#) for the latest updates to their operating hours for card pickup during this time
  o As applicable, obtain building access for new employee by contacting the appropriate building manager(s) for all locations they will need to enter; obtain physical keys as necessary
- Continue requesting and/or follow-up on applicable software/systems access request for new employee (as necessary and able) through ServiceNow
  - Establish the most appropriate and expeditious methods to get necessary equipment to new employee, including corresponding set-up
  - Ensure Equipment Loan Agreement Form is completed. Managers should submit the completed form to their department’s property control coordinator and/or a copy of the form may be uploaded to the associated ServiceNow request ticket.
  - Enroll new employee in Duo Two-Factor Authentication (can incorporate into ServiceNow request)

- Review Flexwork Arrangements Policy with new employee, and complete necessary documentation:
  - Flexible Working Arrangements Agreement Form
  - Telecommuting Agreement Form

- Determine the best collaboration tools/software to use for meetings and discussions with new employee (and for them to use for themselves):
  - Video Collaboration Tool Comparison Matrix
    - BlueJeans
    - WebEx
    - Microsoft Teams

- Review/discuss Georgia Tech Cyber Security information, processes, and resources with new employee, including:
  - Data Management: Security Fundamentals training
  - Cyber Security Best Practices
  - Keep Your Laptop Safe

- Provide new employee with your department’s welcome packet and review all contents

- Establish expectations for new employee’s work day including overall daily/weekly work schedule, including lunch/breaks, as applicable

- Review initial job duties and assignments/projects with new employee
  - Connect this with Mission/Vision/Guiding Documents for team and/or department/unit

- Establish and share overall performance expectations and work standards for new employee
  - Set realistic and clearly defined goals during this discussion; consider using S.M.A.R.T. goals

- Discuss specific expectations for six-month Probationary Period (provisional appointment) with new employee, as applicable
Consider utilizing the Review for Probationary Period form as part of this discussion

- Establish frequency and methods for work progress review and/or formal and informal check-ins with new employee (consider more frequent conversations due to proximity)
- Conduct introductory meeting between new employee and all members of their team
- Ensure new employee meets with their assigned “buddy/partner” for initial scheduled events/activities
- Add new employee to team and department/unit:
  - Phone lists
  - Organizational charts
  - Websites
  - Email lists/listservs
  - Standing meeting invitations
  - Network drives
- Set up new employee’s email account/address and provide direction on proper email signature
- Orient new employee to applicable systems usage (e.g. computer logins, VPN, telephone/voicemail, network drive access, TechWorks/OneUSG, department/unit specific hardware or software)
- Share process with new employee on how to report their work time based on position and department/unit requirements
  - Inform them how time reported will be reviewed and approved

Within New Employee’s First Month

- Continue regular check-ins with new employee
  - Focus attention on successes and challenges with job duties and assignments/projects, and provide support as obstacles arise
  - Review progress toward expectations established for 6-month Probationary Period (provisional appointment) review (as applicable)
    - Consider utilizing the Review for Probationary Period form as part of this discussion (as applicable)

- Coordinate and/or encourage formal and informal meetings (consider more frequent conversations due to proximity) for new employee with:
  - Team members
  - “Buddy/partner”
  - Department/unit leadership
- Key stakeholders/partners
  - Individuals/teams they will be interacting with and/or supporting

- Ensure new employee completes benefits enrollment within 30 days of email/communication from the University System of Georgia (as eligible/necessary)

- Ensure new employee completes retirement enrollment within 60 days of email/communication from the University System of Georgia (as eligible/necessary)

- Ensure new employee utilizes the Georgia Tech Conflict of Interest and External Activities Reporting Portal to disclose any outside activities

- Follow-up on applicable systems access for new employee (as necessary)

- Ensure time is set aside for new employee to attend or complete all necessary training courses

- Share process with new employee on how to request time away from work (e.g. vacation, sick leave) based on position and department/unit requirements
  - Inform them how requests will be reviewed and approved

- Encourage new employee to subscribe to the Georgia Tech Emergency Notification System (GTENS)

**Training Resources**

Consider reviewing these LinkedIn Learning courses and other training resources to assist in managing and onboarding a remote employee/team. Neither required, nor exhaustive, some examples of training resources are listed below:

- [Georgia Tech Human Resources Services & Support](#)
- [The Value of Working Remotely](#)
- [Managing Virtual Teams](#)
- [Managing Remote Workers](#)