

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 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:
 - Welcome breakfast/lunch
 - Team meeting
 - Team “event”
 - *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:
 - 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)
 - Determine how long this relationship will formally last (e.g. first month, first three months, first six months, or longer)
 - 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:
 - Breakfast/lunch
 - Special meeting(s)

Within New Employee’s First Week

- Ensure new employee visits GHTR during their previously scheduled appointment time for new-hire processing
 - 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
 - [Check their website](#) for the latest updates to their operating hours for card pickup during this time
 - 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](#)