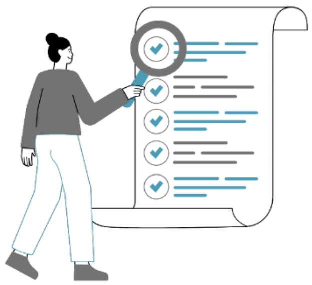
First 90 Days Manager Checklist

New Team Member Onboarding



Use this checklist to plan for your new team member's first 90 days. This includes actions around technology, scheduling, socialization, workspace setup, and more.

**Please be aware that not every item in this checklist will apply to all roles and some actions may be different depending on your site (e.g., Ebenezer, Range, or GICH).

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Pre-Start

Schedule and Team Member Duties

Create Onboarding Plan	Completed
Confirm site/ role orientation schedule(s), time, and location (central training depts schedules)	☐
Prepare first day and first week schedule and add to calendar (First Two Weeks Schedule Template – will download as an excel file to your computer)	☐
Confirm enrollment in role/department specific training programs	☐
Assign any role/department specific Learning Management System (LMS) modules, add time to calendar to complete	☐
Verify content of role specific checklists to document training and competency	☐
Contact Employee	
Communicate start date, place, time, dress code, parking, initial schedule, meals/breaks. (Welcome Letter Template and Remote Worker Welcome Template). Some roles may also be working with a Nursing Education Specialist (NES), but the leader should still reach out to the new team member	☐
Schedule Meetings	
Add to onboarding calendar	☐
Schedule 1:1's with you (One-on-One Meeting Strategies)	☐
Schedule meetings (or create list for new hire to schedule) of introductory meetings with key people needed to onboard	☐
Schedule 30- and 90-day check in conversations	☐
Add reminders to your calendar to celebrate anniversaries	☐
Gather Welcome Information/Resources	
Job description	☐
Contact names for department	☐
Schedule for first week/two weeks	☐
Department/Unit organizational chart	☐
Map of location	☐
Mission/Vision/Strategic goals for department/unit	☐
Fairview Commitments Resources	☐
Specific policies to review	☐

Pre-Start

Socialization

Notify Department of New Hire	Completed
Send via email to department/ unit and copy the new team member	☐
Include start date, what their job will be and a summary of the employee bio	☐
Consider making a welcome sign or card and have the team sign it	☐
Assign New Hire's Buddy	
Buddy Guide – Onboarding a New Team Member	☐
Assign New Hire's Trainer(s)	
Trainer Guide – Onboarding a New Team Member This task may also be managed by the unit's Nursing Education Specialist (NES) and would be their preceptor	☐

Workspace

Desk & Work Area	Completed
Clean the work area	☐
Gather basic desk/office supplies	☐
Verify computer is working	☐
Gather any additional technology needed (docking station, phone, etc.)	☐
Change phone caller ID and voicemail	☐
Request agent access to call center if applicable	☐
Order office name plate if applicable	☐
If remote, gather technology and arrange meeting/ shipment to give to the team member	☐
Security	
Order any key(s)/access cards as appropriate	☐

Pre-Start

Technology Access

IT Hub	Completed
How to: Submitting Request for Access in IT Hub	☐
How to: Order IT Equipment from the IT Hub	☐
How to: Epic Roles: User Access Templates and Sub-templates	☐
How to Use IT Hub Some may be working with Education and Training departments that submit access for you- be familiar with your department process	☐
Other Software	
Grant software access not managed through IT hub	☐
Outlook	
How to: Outlook Information and Support	☐
Add to email groups	☐
Add to Outlook calendars	☐
Add permission to additional mailboxes	☐
Teams	
Add to needed Teams Channels	☐
P-Card	
Submit request if appropriate	☐

First Day

Socialization

Welcome them Upon Arrival	Completed
Arrange to meet in an easy to find, general area	☐
Introductions	
Make sure you or a designee is present to greet and welcome them	☐
Introduce them to department and team members	☐
Arrange time for them to meet team members on a one-on-one basis	☐
Introduce to Onboarding Buddy	☐
Introduce to Trainer(s)	☐
Lunch	
Consider bringing them to lunch or a team lunch	☐

Manager's Initial Meeting

Review Schedule	Completed
Ask about New Employee Welcome	☐
Standard hours	☐
Scheduled 1:1's and what to expect	☐
Training Calendar	☐
Department/role specific orientation	☐
Onboarding objectives/goals/training checklist	☐
LMS lessons	☐
Resources: My First 90 Days	☐
Review Job Description	
Expectations and responsibilities	☐
Employee review timeline and goal setting	☐
Fairview Commitments	☐

Awareness: As part of the New Employee Welcome orientation, each new hire receives the following checklist:

New Employee Welcome - New Hire Checklist

First Day

Review Department/Unit Job Practices	Completed
My Time and badge readers	☐
Dress code	☐
Unexpected absences	☐
Notification of late arrival	☐
Paid Time Off (PTO) requests	☐
Overtime/ differential policies and standards	☐
Shifts and operational hours	☐
Break Schedule	☐
Parking	☐
Department Routines/Activities	
Daily Engagement System (DES)	☐
Team huddles	☐
Team meetings	☐
Team communication	☐
Emergency Procedures	
Unit/Department Safety Checklist **See checklist for some items that must be completed on Day 1** **Entirety of checklist must be completed with 30 days**	☐
Emergency codes	☐
Emergency phone numbers/contacts	☐
Overview of Technology	
Verify Fairview Claim ID is complete	☐
Workstation	☐
LMS	☐
All department/ role specific software	☐
Intranet	☐
Policy Tech	☐
Outlook	☐
Share Onboarding Resource Hub	☐

First Day

Workspace

Tour	Completed
Workspace/office/cube	☐
Locker room	☐
Badge reader	☐
Leader’s office	☐
Lunch/break areas	☐
Restrooms	☐
Provide access cards	☐
Office supplies, workstations, printer	☐
Elevators, stairs, exits	☐
Eye wash station/ emergency shower	☐
Tour of Campus	☐
Parking office	☐
Employee Occupational Health Services (EOHS)	☐

Within First 30 Days

Human Resources

Employee Service Center (ESC) 612-672-5050 ESC@fairview.org

Lawson	Completed
Emergency Contact listed in Lawson	☐
Self ID in Lawson (optional)	☐
Verify correct address listed in Lawson	☐
Direct Deposit (optional)	☐
Benefits	
Pay & Benefits	☐
My Fairview Benefits website	☐
Employee Perks and Discounts	☐
Health and Wellbeing Services	☐

Ongoing Manager Meetings

Orientation	Completed
Review orientation schedule and progress, answer questions, get/give feedback and adjust as needed to meet learning needs	☐
What is going well?	☐
What is your comfort level with different tasks?	☐
What has been the most challenging?	☐
How can I help?	☐
Ensure connecting with Onboarding Buddy regularly	☐
Check-in on progress to complete LMS lessons	☐
Review progress on orientation milestones and role specific checklist	☐
Develop 90-day plan and goals	☐
Provide additional resources needed	☐
Complete 30-day Check-in meeting and document in Talent Connect (see: 30-Day Check-In webpage for guidance)	☐
Have them enroll in the following two modules in the LMS (Instructions for Self-Enrolling): Mandatory Safety Always Part 1 – SYS Mandatory Safety Always Part 2 – SYS	☐

Within First 30 Days

Communication Expectations	Completed
Email (including email signature)	☐
Phone (greetings, transfers, voicemail greeting and how often checked)	☐
Teams	☐
Vocera	☐
Handoffs	☐
Other communication standard methods	☐
Goals	
Review Fairview's mission, vision, and strategic goals of the organization. How does your department contribute?	☐
What are the strategic goals and priorities of the department? Team?	☐
Share current list of department projects	☐
Review Organizational Chart	
Review functions of other departments as relevant	☐
Discuss any additional meet and greets needed and schedule	☐
Employee Responsibilities and Expectations	
Review detailed role responsibilities, competencies, and expectations	☐
Review department specific guidelines and expectations	☐
Discuss your own responsibilities and priorities and how the new employee supports these	☐
Discuss Performance Management process, annual review, and goal setting	☐
Review performance standards, Connecting with Care Service Model	☐
Review Talent Connect	☐

At 90 Days

Ongoing Manager Meetings

Orientation Feedback	Completed
Gather feedback from Onboarding Buddy	☐
Gather feedback from Trainer(s)	☐
Identify any training needed	☐
Orientation	
Review orientation schedule and progress, answer questions, get/give feedback and adjust as needed to meet learning needs	☐
What is going well? (optional activity: Start Stop Continue Worksheet)	☐
What if your comfort level with different tasks?	☐
What has been the most challenging?	☐
Is there anything that you wish you would have known sooner?	☐
How can I help?	☐
Discuss orientation feedback on progress	☐
Review completeness of orientation/ role specific checklists/ LMS lessons	☐
Review competencies/skills completed to date	☐
Determine if orientation is complete	☐
Schedule any additional trainings to finalize orientation	☐
Discuss ongoing development	☐
Complete 90-day Check-in meeting and document in Talent Connect (see 90-Day Check-In webpage for guidance)	☐
Employee Responsibilities and Expectations	
Provide an informal performance appraisal	☐
Refine annual goals	☐
Provide positive coaching to build confidence	☐
Review challenges and develop a plan to resolve	☐
Insights	
If your team uses Insights, arrange for a Discovery profile for your new team member and update the team wheel	☐