

EMPLOYEE ONBOARDING CHECKLIST

Note: All appropriate information should be discussed with each new employee.

Employee's Name: _____ Date of Hire: _____

Job Title: _____ Manager's Name: _____

The information, policies and procedures checked below has been given to or reviewed with the employee. Check only those that apply.

1. Preparing for the New Employee (Day 1)

- Crystal clear about "needs analysis" for onboarding program.
- Receptionist is informed about new employee and they are on the greeting board.
- Assigned Orientation Buddy and prepped them.
- Prepared affinity clothing, coffee cup, etc.
- Created Onboarding FAQ.
- Created Onboarding Acknowledgment.
- Created Onboarding Calendar.
- Created employee file.
- Welcome package sent to home.
- Employee set up in HRIS, payroll, benefits. Provided keys, passes, passwords, etc.
- Employee's work area is prepared. Includes remote work offices. Balloons, business cards, tools, notes, etc. are ready.

2. Welcome the New Employee (Day 1)

- Promptly greeted the employee in the waiting area.
- Reviewed a copy of the employee's job application and resume with the employee. Discussed the employee's experience, training and education.
- Reviewed the job description with the employee, including essential job functions, responsibilities, and working relationships.
- Discussed initial work load.
- Discussed with the employee the unit organization and the department division organization. Explain the total organization and how the employee fits in.
- Reviewed the employee's career goals and objectives. Relate them to the goals and objectives of their position and the department.
- Discussed Career Ladder.
- Discussed Onboarding Process/Calendar.
- Discussed company dress code.
- Introduced them to Onboarding Buddy.
- Took the employee to lunch at _____.

I provided the following documents:

- Company directory
- Employee Handbook
- Safety Plan
- State mandated pamphlets (i.e. in CA the Sexual Harassment is Against the Law pamphlet)
- Summary plan document for healthcare coverage
- Summary plan document for retirement plan
- Training schedule
- Wellness booklet
- Your Workers' Compensation Rights
- Other: _____
- Other: _____

I obtained the following documents:

- Acknowledgment of Employee Handbook
- Acknowledgment of Sexual Harassment Policy
- W-4 IRS Form
- I-9 Paperwork
- Drug-Free Workplace Acknowledgment
- Direct Deposit Form
- Copy of driver's license and insurance
- Other: _____
- Other: _____

3. Introduce the New Employee to Job Environment (Day 1)

- Showed where the restrooms, break rooms, refreshments, etc. are.
- Had the employee sign for any tools, equipment, uniforms, vehicles, etc. provided by the company.
- Explained the levels of supervision within the department and reviewed org chart.
- Provided the new employee with the necessary or required training program information.

Explained the use of:

- | | |
|---|--|
| <input type="checkbox"/> Telephone | <input type="checkbox"/> Mail Procedures |
| <input type="checkbox"/> E-mail/Internet | <input type="checkbox"/> Supply Procedures |
| <input type="checkbox"/> Copy Machine | <input type="checkbox"/> Company Equipment |
| <input type="checkbox"/> Company Vehicles | |

- Explained the hours of work, overtime procedures, call-in procedures.
- Provided emergency telephone numbers.
- Explained any housekeeping responsibilities.
- Explained the Orientation Quiz and 60 Day New Employee Survey.
- Discussed workplace privacy rules around internal use, emails, social media, desks, lockers, etc.

4. Introduce the New Employee to the Company (Day 1)

Introduced the new employee to his/her co-workers:

- Indicated to each co-worker what the new employee's position will be.
- Explained the essential functions of each person to the new employee as you introduce them.

Show the new employee around:

- Toured the company facilities.
- Explained where restrooms, coffee and/or break areas and parking facilities are located.
- Showed safety equipment, alarms, first aid kit, etc.
- Explained the various departments within the organization and their interrelationship.
- Watched orientation video.
- Had meeting with CEO or President.

5. Company Products & Services, Customers, Clients, Vendors and Competitors (Day 2)

- Explained the Company's unique market position.
- Explained the Company's products and services.
- Explained company customers, clients, vendors, and competitors.
- Provided company brochures, marketing materials, etc.
- Discuss company website
- Discuss protection of proprietary property and confidentiality concerns.

6. I explained the following company Policies and Procedures: (Day 2)

- | | |
|--|---|
| <input type="checkbox"/> Absences/Tardiness | <input type="checkbox"/> "At-will" Employment |
| <input type="checkbox"/> Bulletin Board/Company Newsletter | <input type="checkbox"/> Company Vision, Mission, Values, Goals |
| <input type="checkbox"/> Complaint and Grievance Procedures | <input type="checkbox"/> Disciplinary Procedures |
| <input type="checkbox"/> Dress Code | <input type="checkbox"/> EEO Policies |
| <input type="checkbox"/> E-mail/Internet Usage | <input type="checkbox"/> Employee Handbook Acknowledgement |
| <input type="checkbox"/> Ethics Code | <input type="checkbox"/> First Aid/Emergency Contact |
| <input type="checkbox"/> I.D. Card/Badge/Keys | <input type="checkbox"/> Introduction to Security Guards |
| <input type="checkbox"/> Parking Facilities | <input type="checkbox"/> Performance Measurement/Review |
| <input type="checkbox"/> Reporting of Injuries or Illness | <input type="checkbox"/> Safety Booklet/Equipment |
| <input type="checkbox"/> Sexual Harassment Policy Acknowledgment | <input type="checkbox"/> Social Media Use |
| <input type="checkbox"/> Outside Training Programs | <input type="checkbox"/> Transportation/Ride Share Program |
| <input type="checkbox"/> Other _____ | <input type="checkbox"/> Other _____ |

7. I explained the following Compensation and Benefits: (Day 2)

- | | |
|--|---|
| <input type="checkbox"/> Credit Union | <input type="checkbox"/> Dental Plan |
| <input type="checkbox"/> Disability Pamphlet | <input type="checkbox"/> Educational Assistance Program |
| <input type="checkbox"/> Employee Assistance Program | <input type="checkbox"/> Health Care Plans |
| <input type="checkbox"/> Holidays | <input type="checkbox"/> Insurance Program Booklet(s) |
| <input type="checkbox"/> Jury Duty | <input type="checkbox"/> Leave of Absence |
| <input type="checkbox"/> Maternity Leave/FMLA Leave | <input type="checkbox"/> Overtime |
| <input type="checkbox"/> Paid Time Off or Sick Pay Benefits | <input type="checkbox"/> Payroll Procedures |
| <input type="checkbox"/> Pension Plan or 401(k) Plan Summary | <input type="checkbox"/> Promotions Policy |
| <input type="checkbox"/> Savings Bond Plan | <input type="checkbox"/> Short Term Disability |
| <input type="checkbox"/> Stock Option Plan | <input type="checkbox"/> Stock Purchase Plan |
| <input type="checkbox"/> Time Sheet/Card | <input type="checkbox"/> Transfers |
| <input type="checkbox"/> Vacation Policy | <input type="checkbox"/> Vision Plan |
| <input type="checkbox"/> Wellness Program | <input type="checkbox"/> Workers Compensation Pamphlet |
| <input type="checkbox"/> Other _____ | <input type="checkbox"/> Other _____ |

8. Ongoing Onboarding (Ongoing First 60 Days)

- Follow up on training plan.
- Review initial performance.
- Seek feedback.
- Help them “connect” with co-workers, customers, vendors, etc.
- Have someone take to lunch every day for one week.

9. Making Sure They “Got It” (Ongoing First 60 Days)

- Employee completed Onboarding Quiz.
- Employee completed Onboarding Game.
- Debriefed employee regarding experience so far and addressed any questions.
- Completed 60-Day New Employee Survey.

10. Other (Please Comment)

- Set a date and time, within one week, to cover any questions or concerns of the new employee and check on progress.

- _____

- _____

- _____

11. The employee onboarding process has been completed as of:

Signature of HR/Manager/Supervisor

Title

Department

Date
