

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 have been given to or reviewed with the employee. Check only those that apply.

1. Preparing for the New Employee (Before Day 1)

- The receptionist is informed about new employees, and they are on the greeting board.
- The team is notified of meet and greet w the new employee.
- Assigned Orientation Buddy and prepped them.
- Prepared affinity clothing, coffee cup, plant, etc.
- Created Onboarding FAQ.
- Created Onboarding Calendar.
- Created employee file/folder.
- Welcome package sent to home. Welcome videos sent.
- Employee set up in HRIS, payroll, benefits. Provided keys, passes, passwords, etc.
- Employee's work area is prepared. Balloons, business cards, tools, name plate, welcome notes, etc. are ready.

2. Welcome the New Employee (Day 1)

- Promptly greet the new employee in the waiting area, or online.
- Manager to review the job description with the employee, including essential job functions, responsibilities, and working relationships.
- Discuss initial workload and place on 90-day performance plan.
- Discuss with the employee the unit organization and the department division organization. Explain the total organization and how the employee fits in.
- Review the employee's career goals and objectives. Relate them to the goals and objectives of their position and the department.
- Discuss Career Ladder.
- Discuss Onboarding Process/Calendar.
- Show where the restrooms, break rooms, refreshments, etc. are
- Orientation Buddy to take the employee to lunch.

Provide the following documents (new hire packet):

- 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: _____

Obtain 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 the Job Environment (Day 1)

- Have the employee sign for any tools, equipment, uniforms, vehicles, etc. provided by the company.
- Discuss workplace privacy rules around the use of desks, lockers, etc.
- Provide the new employee with the necessary or required training program information.

Explain 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 | |
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- Explain the hours of work, overtime procedures, call-in procedures.
 - Provide emergency telephone numbers.
 - Explain any housekeeping responsibilities.
 - Provide the Entrance Interview and 60-Day New Employee Survey.

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

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

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

Show the new employee around:

- Tour the company facilities.
- Show safety equipment, alarms, first aid kit, etc.
- Explain the various departments within the organization and their interrelationship.
- Watch orientation video.
- Meeting with CEO or President.

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

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

6. HR to discuss company Policies and Procedures: (Day 2)

- | | |
|---|--|
| <input type="checkbox"/> Absences/Tardiness | <input type="checkbox"/> "At-will" Employment |
| <input type="checkbox"/> Bulletin Board/Company | <input type="checkbox"/> Company Vision, Mission, Values, |
| <input type="checkbox"/> Complaint and Grievance | <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 |
| <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 | <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. Explain 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 | <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 to complete Orientation Quiz.
- Employee to complete Orientation 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 orientation process has been completed as of:

Signature of HR/Manager/Supervisor

Title

Department

Date