



## ONBOARDING CHECKLIST

Here is an overview of some of the crucial elements and some simple checklists that could be included when creating a strong extended Onboarding program:

### Day 1 | Create a “Pre-Boarding” Orientation Day

**Consider implementing a “Pre-Boarding” day** where the new hire comes to the worksite just to complete all the required HR forms, legal paperwork, and other required information. This day can include a detailed tour of your company facilities, helping the new hire feel at home before officially starting their first full day on the job!

**Take note:** If the new employee physically visits your work site, this is legally considered “being on the job,” and new hires **must be paid for these hours.**

#### Completion of New-Employee Paperwork

- W-4 and state tax forms
- I-9 form
- Misc. Forms
- Employee handbook issued

#### Security Check-In

- ID badge
- Facility Keys
- Facility access card
- Parking Permit/Pass

#### Worksite Tour:

Before the first workday, have the new hire come to the worksite to familiarize themselves with

- |  |   |
|--|---|
| <input type="checkbox"/> Restrooms                         | <input type="checkbox"/> Water/Coffee/vending machines            |
| <input type="checkbox"/> Mailroom                          | <input type="checkbox"/> Emergency exits                          |
| <input type="checkbox"/> Copy center, printer, fax machine | <input type="checkbox"/> First Aid supplies                       |
| <input type="checkbox"/> Bulletin board                    | <input type="checkbox"/> Tour of various departments              |
| <input type="checkbox"/> Parking options                   | <input type="checkbox"/> Show the New Hire’s actual work location |
| <input type="checkbox"/> Office supply room                | <input type="checkbox"/> Dress code                               |
| <input type="checkbox"/> Lunch/Break room                  |   |



## Day 2 | Introduction to HR and Office Set Up

While every business is unique in how onboarding responsibilities are shared throughout the company, there are some general guidelines for allocating onboarding duties and accountability. This day should familiarize the new hire with an overview of the company and the personnel they will be working with.

### Meeting with HR Team/or Worksite Employer

This session reviews company HR policies, expected work behaviors, and performance standards. The new employee should be given a copy of your company's Employee Handbook and a file folder to store copies of their paperwork.

#### Benefits and Compensation

- Health, life, and disability insurance
- Retirement benefits
- Dependent care FSA
- Educational assistance
- Employee assistance programs
- Pay procedures
- Overtime
- Salary increase/performance review process
- Incentive/bonus programs
- Paid and unpaid leave
- Vacation and sick leave
- Time-keeping process

#### Key Policy Review if Appropriate

- FMLA/leaves of absence
- Harassment/Discrimination
- Personal conduct standards
- Progressive discipline
- Security
- Confidentiality
- Safety & Injury reporting
- Emergency procedures
- E-mail, phone & Internet usage

#### Office Manager / IT Staff

- Office Manager explains administrative procedures, sets up office/desk
- IT sets up computer workstation, email, server access, computer username /password
- Mail (incoming and outgoing)
- Business cards, name tag
- Purchase requests / Office Supplies
- Telephones
- Conference rooms
- Expense reports



### **Day 3: | Introduction to Company Admin Procedures and Key Staff**

#### **Meeting with Owner/Management Team**

A warm welcome from the management team imparts a feeling of being a valued team member.

This meeting should include:

- Organization's history
- Company mission & values
- Company strategic goals and objectives
- Communicating the roles and responsibilities of the Management Team
- Organizational chart and operational structure

#### **Meeting Direct Supervisor**

- Discussing duties and responsibilities
- Touring the department
- Review other roles and relationships within the department.
- Sharing how the group works as a team
- Explanation of how to get things done, find/requisition tools and equipment, and where to turn for support.

#### **Meeting Trainer | Mentor | Work Buddy**

- Introducing the new hire to their trainer or assigned Mentor or Work Buddy who can answer day-to-day questions.

#### **Meeting Co-Workers**

- Introduction to team members and other staff that will interact with the new employee.

### **Day 4 | Direct "On the Job" Training Begins**

- New Employee has a full day or multiple days working with their trainer.
- Have the new hire shadow or watch a co-worker who is familiar with the new hire's job.
- Direct training can take place over multiple days/weeks, or months

### **Day 5 | Working with a Mentor or Assigned Work Buddy**

- Initial* Check-In session – can be a lunch or extended coffee break with the assigned mentor to address the new employee's concerns or to answer questions.
- Ongoing* Check-In sessions should also be scheduled over a 3-month period.