# **New Hire Orientation and Onboarding Checklist**

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|  | **TASK** | **WHEN** |
|  | **Offer Made & Accepted** |  |
| **✔** | Confirm salary and offer with manager. Document at top of form. | 2 weeks prior |
|  | Write offer letter and send to candidate. Confirm via phone call. | 2 weeks prior |
|  | Finalize candidate offer and start date. Update form above. | 1 week prior |
|  | **Setup:** Notify all relevant departments of new hire name and start date so that all is ready for new hire on day 1:   * IT login IDs and passwords? * Hardware and software installed and set up? * Phone and extension? * Office keys, time card, security badge or parking passes? * Workspace, desk, file cabinets? * Name tag, office sign, business cards? | 1 week prior |
|  | **Welcome:** Determine what to include in welcome kit, whether to host a breakfast, post a welcome sign or bring in coffee/donuts. | 1 week prior |
|  | **Communications:** Draft internal and external communications so they’re ready on day 1:   * Interoffice memo/email * Company newsletter * Org chart * Press release | 2 days prior |
|  | Verify all prior steps completed, and ready for new hire day 1 | 1 day prior |
|  | **Background Checks** |  |
|  | Drug testing completed & passed? | 1 week prior |
|  | Criminal and other background checks completed and passed? | 1 week prior |
|  | **Welcome Letter** |  |
|  | Write welcome letter and send to candidate. Include helpful details such as:   * Office address and information on where to enter building * Start time, manager’s name and information on day 1 agenda * Map of office and information on where to park * Documents to bring on day 1 (e.g., SSN, driver’s license for I-9) * Copy of company brochure, vision statement or any background information on company * Employee handbook (if you want them to have it in advance) | 1 week prior |
|  | Contact candidate via phone, text or email to confirm their arrival and answer questions about where to park or who to ask for. | 1-2 days prior |
|  | Day 1 Welcome and Orientation |  |
|  | Introduce new hire to supervisor, key managers and co-workers | Day 1 |
|  | Introduce to peer-mentor (go-to person) to ask questions | Day 1 |
|  | Take employee photo | Day 1 |
|  | Tour facility to show new hire workspace and key office areas. Don’t forget to show new hire:   * Break room and lunch area * Conference rooms * Supply area, copy machines * Restrooms * Emergency exit plan * Labor law posters | Day 1 |
|  | Complete critical new hire paperwork, such as:   * I-9 form (employment eligibility) * W-4 form (tax withholding) * Emergency contact form or Employee data sheet * Direct Deposit Form | Day 1 |
|  | Give employee copies of key documents to review, such as:   * Company policies and/or employee handbook * Department phone list and/or org chart * Training and meeting schedule for the coming week * Computer login instructions and phone reference guide | Day 1 |
|  | Schedule time with supervisor to review job description and role | Day 1 |
|  | Issue keys, badges, business cards and any other tools they need | Before end of day 1 |
|  | Onboarding -- First Week on the Job |  |
|  | Schedule one-on-one meetings with key employees & managers; make sure daily meeting with peer mentor, and lunches are scheduled. | Day 2 |
|  | Ask employee what questions / concerns they have from day 1. | Day 2 |
|  | Review cheat sheets, phone lists, office maps, voicemail instructions to see if employee has any questions or needs assistance. | Day 2 |
|  | Review org chart and company structure; share who does what. | Day 2 |
|  | Review company policies, labor law poster and employee handbook, allowing new hire to ask questions before requesting signature. | Day 3 |
|  | Schedule employee to shadow a peer for the day to see what a typical work day looks like. | Day 4 |
|  | Provide training on software systems and other job tools. | Days 2-5 |
|  | Schedule meeting at end of first week to check in on employee’s progress | Day 5 |
|  | Onboarding -- First Month on the Job |  |
|  | Review employee benefits and health insurance. Review enrollment forms and request employee to complete enrollment documents, including health care, 401(k), beneficiaries and other programs offered. | Before end of month |
|  | Provide training on business processes, tools and software, including HR practices, safety, work policies and supervisory or leadership training. | As needed, such as 4 hours per week |
|  | Check in to see how they’re getting along with supervisor, peers. Do they have the contacts needed? Who do they need to meet? | Weekly |
|  | Review performance goals. Find out how they’re doing with tools, resources, is there anything they need to be more productive? | Weekly |
|  | Ongoing -- First 90 Days |  |
|  | Additional training needed? Scheduled? | As needed |
|  | Performance discussion schedule and conducted? | Monthly |
|  | Employee invited to team building activities, outings with peers? | As available |
|  | Employee identified as a contributor on at least one project? | As available |
|  | New hire feedback shared with HR, supervisor and others? | Monthly |
|  | Ongoing Onboarding |  |
|  | Informal two-way conversations with manager to review performance, ideas, training needs and other issues. | Monthly |
|  | Check in with HR to identify any needs, concerns, issues, ideas. | Monthly |
|  | Plan 1st year anniversary celebration or acknowledgment. | Month 11 |
|  | Conduct annual performance review and feedback session. | Month 12 |
|  | Additional Tasks and Notes |  |
|  | Use this space to document additional tasks and notes that you’d like to cover with your new hire as part of their first year orientation to the company. Include items such as key review dates, work goals or external conferences you’d like them to attend. |  |

***Optional:*** *File this document in the employee personnel folder for reference*