New Hire Name: **Job Title:**

New Hire Start Date: **Pay Rate:**

New Hire Reports to: **Status:**
                                                  (Exempt/Non-exempt)

New Hire Orientation and Onboarding Checklist

	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	1 week prior

	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 (i.e. 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 in advance)	

	Contact candidate via phone, text or email to confirm their arrival and answer questions about where to part 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	1 week prior

New Hire Name: **Job Title:**

New Hire Start Date: **Pay Rate:**

New Hire Reports to: **Status:**
                                             (Exempt/Non-exempt)

	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, 401k, beneficiaries and other programs offered.	Before end of month
	Provide training on business processes, tools and software -- include 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. Included 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