

CHECKLIST | ONBOARDING

Presented by ToughComp

Onboarding is the process of hiring new employees and integrating them into the organization. An effective onboarding process is essential because it can help employees stay with their organization, both in the short and long term. During this time, the employee completes paperwork, learns company protocols and receives training, tools and other resources to help them perform their duties effectively. When done properly, it can be an excellent opportunity to make a positive first impression on employees and ensure they feel like the company is a good fit. Ultimately, successful onboarding can increase employee attraction and retention.

This checklist is intended as a guide. The onboarding process may differ based on your organization's size and other factors, meaning these steps can and should be modified to meet your organization's unique needs. Due to the complexities of onboarding, employers are encouraged to seek legal counsel if any concerns or questions arise. This checklist can be referenced by a supervisor, manager or HR representative to help ensure critical steps are not missed when onboarding employees.

Before the Employee's First Day	Completed
Send an email welcoming the new employee and providing details about their first day. This email should include information about the employee's start date, time and location. It should also explain the dress code, if applicable. Be sure to highlight any pre-employment tasks that need to be completed.	<input type="checkbox"/>
Prepare or provide any new-hire paperwork that will need to be completed on or before the employee's first day. The timing of when this paperwork is completed can vary by employer, but generally, new-hire paperwork may include the following: <ul style="list-style-type: none">• Employment Eligibility Verification form (Form I-9)• Tax forms• Direct deposit form• Emergency contact information• Employee handbook• Benefits information, if applicable• Employee agreements (e.g., nondisclosure, employee handbook acknowledgment, etc.).	<input type="checkbox"/>
Plan the employee's orientation, initial training and assignments.	<input type="checkbox"/>
Prepare the employee's workstation and equipment, such as a computer, phone and office supplies. If the employee will be working remotely, provide them with the requisite equipment and supplies, including setup information and instructions.	<input type="checkbox"/>

This checklist is merely a guideline. It is neither meant to be exhaustive nor meant to be construed as legal advice. It does not address all potential compliance issues with federal, state or local standards. Consult your licensed representative at ToughComp or legal counsel to address possible compliance requirements. © 2023 Zywave, Inc. All rights reserved.

Before the Employee's First Day	Completed
Help the employee set up necessary accounts and create logins.	<input type="checkbox"/>
Add regularly scheduled meetings to the employee's calendar.	<input type="checkbox"/>
Add the employee to relevant email distribution lists.	<input type="checkbox"/>
Providing existing employees with relevant information about their new team member—such as the new hire's start date, role and a brief background. Include the new employee, if appropriate.	<input type="checkbox"/>
Select and meet with the new hire's mentor, if applicable.	<input type="checkbox"/>
Set up meetings with critical people for the employee's first few weeks, such as their mentor and teammates they will collaborate with frequently.	<input type="checkbox"/>
Design training materials to help the new hire understand their duties, including any systems and tools they'll need to fulfill their job responsibilities and arrange the pertinent training required for the job.	<input type="checkbox"/>
Order business cards for the new employee, if necessary.	<input type="checkbox"/>

The Employee's First Day	Completed
Greet the employee and give them a tour of the office or facility.	<input type="checkbox"/>
Show the employee their workstation and how to operate their equipment.	<input type="checkbox"/>
Provide the employee with information to set up their voicemail and computer, including email, other company accounts, and any other required systems.	<input type="checkbox"/>
Give the employee a security card and/or keys to access the facility, if applicable.	<input type="checkbox"/>
Introduce the employee to their co-workers and mentor, if applicable.	<input type="checkbox"/>
Review an outline of their duties, assignments and expectations for the first week and beyond with the employee.	<input type="checkbox"/>
Provide a welcome package that includes a copy of the employee handbook and review its contents, such as hours of work, lunch and break times, policies for overtime, use of vacation, sick time and holidays. Have the employee sign the handbook acknowledgment if they haven't already done so.	<input type="checkbox"/>
Provide the employee with a schedule for their first week.	<input type="checkbox"/>
Explain to the employee how to contact HR or IT support, if applicable.	<input type="checkbox"/>

If new hire paperwork and related tasks have not yet been completed, ensure that these tasks are taken care of.	<input type="checkbox"/>
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The Employee's First Week	Completed
Schedule training related to company policies and procedures, such as workplace safety, cybersecurity, sexual harassment and diversity.	<input type="checkbox"/>
Provide the employee with an overview of the company's benefits and insurance options, if applicable.	<input type="checkbox"/>
Give the employee their initial assignment. Typically, this can be something small and achievable.	<input type="checkbox"/>
Briefly check in with the employee each day to address any questions or concerns they may have.	<input type="checkbox"/>
Explain the company's annual performance review and goal-setting process, if applicable.	<input type="checkbox"/>
Review the process related to the probationary period, if applicable.	<input type="checkbox"/>
Schedule a check-in meeting with the employee's supervisor or mentor.	<input type="checkbox"/>

The Employee's First Three Months	Completed
Schedule and conduct one-on-one meetings with their manager regularly while giving timely, useful feedback.	<input type="checkbox"/>
Meet for an informal three-month performance check-in.	<input type="checkbox"/>
Create written performance goals and professional development goals.	<input type="checkbox"/>
Provide employees with opportunities to provide feedback on their onboarding and work experience.	<input type="checkbox"/>
Meet with the employee's mentor to review the initial stages of mentorship and answer questions.	<input type="checkbox"/>
Ensure the employee has completed all required training.	<input type="checkbox"/>
Provide information about continued learning and development opportunities, if applicable.	<input type="checkbox"/>

The Employee's First Six Months	Completed
Conduct a six-month performance review.	<input type="checkbox"/>
Review progress on performance goals and professional development goals.	<input type="checkbox"/>

Allow the employee an opportunity to provide feedback about their onboarding and work experience.	<input type="checkbox"/>
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The Employee's First Year	Completed
Acknowledge and celebrate the employee's contributions and achievements.	<input type="checkbox"/>
Continue providing regular informal and formal feedback during the annual review process. Discuss potential goals for the next year and identify relevant learning opportunities.	<input type="checkbox"/>
Have a conversation with the employee about their experience to date and survey the employee about their onboarding experience.	<input type="checkbox"/>
Provide ongoing training, when relevant, and continued learning and development opportunities.	<input type="checkbox"/>

Use this checklist as a guide when establishing, reviewing or improving your organization's onboarding process. For more workplace resources, contact ToughComp.



WORKERS COMPENSATION

Non Renewed?
High Premiums?
State Fund?

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