

Onboarding Checklist for Hiring Managers *TEMPLATE*

Onboarding is a long-term process that begins before your new employee arrives. It should continue for at least the first six months, and, ideally, through the first year.

The idea is to improve your new employees' initial experience working in your organization. By engaging in this process, you jump start their ability to contribute to your organization's goals and increase the likelihood that your employees will stay.

This checklist is designed to help you plan for a new employee's arrival. Once your employee starts, you can work together to complete the checklist. Keep in mind - this checklist is a template. You should customize it to fit your needs.

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Pre-Arrival

Engage Early

- Contact (preferably by telephone) your new employee after HR has confirmed the new employee's start date
- Contact new employee (by telephone and/or email) periodically to "touch base"
 - Make yourself available to answer your new employee's questions
 - Provide information about transportation options, commuting options, rideshare website information, etc.
- Determine what your new employee needs to know to become productive as quickly as possible

Plan for Success

- Prepare on-boarding packet to supplement agency orientation packet provided by the human resources office (e.g., organizational charts, job-specific information, resources list, websites and other reference sources used)
- Schedule of key meetings for your new employee
- Clearly define the career path for your new employee (discuss during first week)
- Create a training schedule for first year
- Create milestones for first year

Set-up Resources

- Identify and prepare employee's work area
- Order/set-up computer workstation
- Arrange for phone and voice mail and other equipment
- Determine/order optional items (e.g., cell phone, mobile device, laptop, printer)
- Identify and label office mailbox
- Order office supplies and put in work area
- Complete security badge form
- Identify which offices, conference rooms, spaces for which access is required
- Send information technology (IT) access request to IT department for access (e.g., specify shared drives)
- Request employee be added to internal email distribution groups
- Ensure any accommodations needed are ready

Involve the Team

- Send email to staff introducing new employee
- Set-up welcome lunch with team
- Identify employee sponsor ("buddy") and provide sponsor checklist

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First Day

- Welcome and escort your new employee to the organization's Employee Orientation
- Lunch for you, your new employee, and your team (if employee orientation is all day, then team lunch during the first week)
- Explain the work of your unit, the employee's role, and working relationships
 - Review organizational chart
 - Describe the organization and its functions
 - Explain levels of supervision in the unit
 - Explain to whom the employee reports and who, if anyone, reports to the employee
 - Have the current job description available for discussion
 - Explain the employee's position in the unit and describe the relation of his/her work to that of others in the unit
 - Explain how the employee's job duties relate to the unit's mission, the agency's mission, and the work of other agency organizations
- Describe the facility layout/conduct a tour
 - Work areas
 - Restrooms/water fountains/water cooler/kitchen areas
 - Cafeteria, snack bar(s), break rooms, vending machines
 - Health unit
 - Security
 - Location of copiers and fax machines and passwords, printers, etc.
 - Conference rooms and how to reserve them
 - Office supply areas
 - Restaurants and local amenities (e.g., ATM, post office, pharmacy)
- Review telephone information and procedures
 - Phone numbers
 - Dialing instructions for local/long distance calls
 - Telephone features (e.g., voice mail, conferencing); provide manual if you have one
 - Personal use policies
- Review information technology (IT) procedures
 - Network access (including remote email access)
 - Intranet
 - IT support
 - IT use policy and IT security training

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First Day (Continued)

- Review physical security/emergency procedures
 - Ensure employee has ID badge
 - Provide office keys/codes
 - Ensure access to all necessary rooms
 - Emergency evacuation/dismissal procedures
 - Inclement weather policies/procedures
 - Discuss procedures for reporting potential hazards and actions to be taken if injured or if someone is hurt

- Review travel information/policies and procedures
 - Travel reimbursement procedures
 - Travel credit card (as applicable)

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First Week

- Job
 - Training requirements
 - Position description
 - Job expectations
 - Individual goals and objectives
 - Milestones
 - Clearly define the career path
 - Review calendar of events
 - Set 30 day priorities
- Ensure Personal Identity Verification (PIV) card access to conference rooms and other entry doors, as applicable
- Go over Federal and organizational acronyms
- Ensure employee has completed any mandatory training required to start
- Explain the duties to employee
 - Identify appropriate assignments the employee can start immediately
 - Discuss specific duties and responsibilities of the job
 - Explain quality and quantity requirements
 - Provide learning aids and resources (e.g., work samples, forms, manuals, Standard Operating Procedures (SOPs), access to shared directories, etc.)
 - Indicate whom to contact for help when needed
- Review HR/Administrative Policies and Procedures
 - Work schedules/core work hours
 - Office coverage
 - Overtime/compensatory time policies
 - Telework policy
 - Alternative work schedules
 - Lunch/break periods
 - Timekeeping/work reporting procedures
 - Procedures for requesting leave and reporting illness/emergencies
 - Responsibilities regarding personally identifiable information (PII)
 - Encourage employee to discuss benefits with HR

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First Three Months and Beyond

- Provide feedback on the new employee's performance and also solicit feedback from the employee to gauge whether the job experience meets what was expected
- Solicit informal feedback from peers who have been working with the new employee
- Continue to look for opportunities to integrate your new employee with the work groups/teams, and into the organization as a whole
- Encourage your new employee to share ideas for improving the operations, strategies, work, and/or culture of the organization