

Dr. Gia Consulting
Not Your Mom's
NEW HIRE ORIENTATION CHECKLIST

The first few months are a significant adjustment period for new employees. New Hire Orientation is a critical part of the onboarding process.



High-level **New Hire Orientation Checklist:**

- New employee fears and anxieties
- Job descriptions, tasks, and expectations
- Organizational culture and values
- General policies and procedures

Detailed **New Hire Orientation Checklist:**

Ease Anxieties

At the beginning of the process

- Confirm start date, time, and dress code with new employee
- Alert appropriate personnel that the new employee is arriving (such as the security guard and receptionist).
- Arrange for a personal greeting (introduce the new employee to manager / team members).
- Provide a company roster (name, number, title, and responsibility).
- Affirm that the new employee is welcomed, valued, and an important part of the organization's success.

During the process

- Consider a public announcement in the company newsletter or via email.
- Schedule a meeting or perhaps a lunch with the manager and team.
- Affirm that the new employee is welcomed, valued, and an important part of the organization's success.

At the end of the process

- Provide the contact information for the appropriate orientation or Human Resources person accountable for the orientation process. Inform new employees of that person's availability if there are any questions or concerns after the program.
- Affirm that the new employee is welcomed, valued, and an important part of the organization's success.

Dr. Gia Consulting
Not Your Mom's
NEW HIRE ORIENTATION CHECKLIST

Housekeeping

General information that helps to support the new employee's comfort and facilitates the orientation process is very important. This includes, but may not be limited to, the locations of the:

- Building access information
- Map of the facilities
- Restrooms
- Cafeteria and/or local eateries
- Employee lounge and/or smoking areas (please be clear if it is a non-smoking campus)
- Safety information (such as emergency exits, fire extinguishers, stairwells, and first aid kits)
- Supply room or purchasing staff
- Security
- Parking information
- Transportation information

Employee Personnel File

This includes but may not be limited to the employee's:

- Job description
- Job application
- Welcome / Offer of employment
- IRS Form W-4
- Résumé
- Interview summary
- Reference check information
- Next of kin / Emergency contact information
- Verifications (including licenses and certifications)
- Signed confirmation of receipt of employee handbook
- Training completion documentation
- Employee / Employer agreements (i.e. non-compete or employee contracts)

Tasks and Expectations

- Provide the employee with a copy of their job description (ensure they understand the nature of each task), communication expectations, and performance standards.
- Employee evaluations / Performance reviews
- Probationary period information

Necessary Paperwork

This includes, but may not be limited to:

- INS Form I-9
- Employment eligibility verification
- Employment agreements
- Signature form confirming receipt of the employee handbook
- W-4 Form (payroll withholding)
- Personal data sheet (personal contact information)
- Emergency contacts
- Social security or identification card information
- Benefit coverage election(s)
- Beneficiary designation forms for benefit programs

Provide Copies of Relevant Documents

This includes but may not be limited to the:

- Employee handbook
- Safety plan
- Annual report
- Employee newsletter
- Explanation of COBRA (Consolidated Omnibus Budget Reconciliation Act of 1988) benefits following separation
- Direct payroll deposit request
- Employee benefit booklet explaining each of the organization's offered benefits

Payment Procedures

This includes but may not be limited to:

- Work hours
- Attendance and tardiness policy
- Payroll periods
- When payment is available (including when they should expect to receive their first check)
- How payment is received (i.e. direct deposit, check pick-up)
- Rate of pay
- Overtime/flextime/comp time rules
- Introductory or probationary employment period
- Advancement and promotion opportunities and procedures

Explain What the Organization Does

Provide and explain the:

- Mission
- Vision
- Core values
- Philosophy
- Background or historical information
- Operating principles
- Products and/or services
- Number of employees
- Profitability
- Branch locations
- General industry information
- Department goals and strategic objectives
- Code of ethics
- Disciplinary or corrective action systems
- Any information relevant to the company's culture
- Marketing and informational materials developed for the organization's customers

Explanation of Organizational Practices and Procedures

This includes but may not be limited to:

- Standard operating procedures (SOP)
- Job specific polices, rules and regulations
- Training expectations
- Use of equipment (including phones, computers, company vehicles)
- Confidentiality
- Sexual Harassment
- Hostile work environment / Workplace violence
- Diversity (i.e. women, minorities, LGBTQ)
- Disabilities (i.e. reasonable accommodations)
- Employee suggestion/feedback program
- Social media policy
- Grievance policy
- Media policy (i.e. identified organizational spokesperson)
- Parking arrangements
- Union-related information if the employee will be in a represented group
- Organizational activities (i.e. annual meeting or fund raiser)

Benefits

This may include, but not be limited to:

- Medical insurance
- Patient Protection and Affordable Care Act (PPACA)
- Sick leave
- Vacation time
- Personal days
- Paid leave
- Unpaid leave
- Jury duty
- Holidays / Floating holidays
- Unemployment insurance
- Retirement plans
- Pension programs
- Savings programs (i.e. Christmas or vacation spending account)
- Employee stock ownership plans
- Gain sharing
- Life insurance
- Long-term and short-term disability insurance
- Accident insurance
- EAP (employee assistance programs)
- Health Insurance Portability and Accountability Act (HIPPA)
- Occupational Safety & Health Administration (OSHA) guidelines
- Family medical leave (FMLA)
- Tuition reimbursement
- Voting time off
- Flexible spending accounts
- Wellness program
- Perquisites
- Quality of work life (i.e. free coffee, gym access, or discount entertainment tickets)
- Organized employee activities (i.e. company picnic, Holiday party and awards ceremony)
- Other benefits you offer and how much they will cost the employee

Orientation is a critical first step to get new employees started on the right foot at their new organization. It should always be included as part of a comprehensive onboarding process.

Dr. Gia Consulting
Not Your Mom's
NEW HIRE ORIENTATION CHECKLIST

Reference:

1. Buckner-Hayden, Gia, "The Impact of an Onboarding Program on Employee Outcomes at the Community Mental Health Council (CMHC): Did the Organization Benefit from an Enhanced Workforce?" (2012). *Ed.D. Dissertations*. Paper 43.
 2. Finn, P. (2006). *The importance of being onboarded*. Evanston, IL: Northwestern University School of Education and Social Policy. Retrieved October 16, 2009, from <http://www.sesp>.
 3. Messmer, M. (1999). *Human Resources Kit for Dummies*. New York: Wiley Publishing, Inc.
 4. Suggs, G. (2014). *Maximize the Success of New Employees: Onboarding, A Flightplan for Taking Your Workforce to New Heights*. St. Charles, IL: BFP Books.
 5. Truesdell, W. (1998). *New employee orientation: Starting off on the right foot*. The Management Advantage, Inc. retrieved August 6, 2010, from <http://www.managementadvantage.com/products/free-ee2.htm>.
-

Contact Dr. Gia at 1.844.4.DrGiaNow or visit Dr. Gia online at www.DrGia.com.

For more information on onboarding visit: <http://www.onboardingthebook.com>

