# New Hire Orientation Checklist

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| **Form Owner:** | Human Resources |
| **Form Used By:** | Managers |
| **Process Responsibility:** | Hiring Managers, Human Resources, IT, Office Services |
| **Final Accountability:** | Hiring Manager |

It is important for new people joining the Company to feel welcome. First impressions stick! While it does take some effort to ensure things are in place before new hires come aboard, we need to demonstrate our "can do" culture during the first interview and every step thereafter. Let's be prepared to provide new people with the tools and information they need to be productive immediately.

As soon as a candidate has accepted an offer with a concrete start date and the new hire can be made public, the following actions are to be implemented by:

- The Hiring Manager
- Information Technology Group (IT)
- Office Services (or Administration)
- Human Resources Senior Person
- Human Resources Administrator
- Payroll

# New Hire Orientation Checklist

## Hiring Manager

**Before the new hire's first day:**

- ✓ Assign a "buddy/go-to person" to the new hire for the first 2 weeks.
- ✓ Determine if a phone card, credit card or mobile phone is needed. If so, advise Accounting in advance.
- ✓ Determine the new hire's seating and workspace with Office Services as soon as the offer has been accepted.
- ✓ Determine the new hire's computer equipment and software application requirements and discuss with IT as soon as the offer has been accepted.
- ✓ Prepare for the new hire's arrival. No matter how competent and capable, the new hire will be looking to you, the Manager, to structure and guide them through the first week. Gather reading material, files, and history for the new hire. An email account should be set up by I.T. one week before the new hire's arrival – go ahead and begin sending appropriate information to the new hire by email as soon as the email account is set up. Give the new hire something tangible to work on as soon as he/she arrives and be prepared to provide extra guidance throughout the first few tasks. It's important that you both understand exactly what is expected from the new hire.
- ✓ Block off time on your calendar from 11:00 am onward on the new hire's first day so you can spend time with him/her after the new hire receives the general orientation from administrative individuals.
- ✓ A few days before the new hire's start date, schedule meetings for the new hire with his/her immediate stakeholders, direct reports, or peers for the first few days on board. The Outlook meeting request calendar function is likely the most efficient way to set up these meetings. Book a boardroom at the same time if applicable. These meetings will help the new hire gather information, indoctrinate, meet key team members, and understand our business and how we do things in the Company.

**On the new hire's first day:**

- ✓ Take the new hire on a tour of the office to familiarize him/her with the location of all the departments and key team members.
- ✓ Send out a welcome/announcement email before or on the new hire's first day. Refer to EXAMPLE: " Announcing New Employee" template.
- ✓ Ensure the new hire is taken out to lunch, preferably by you and the immediate team.
- ✓ Complete the Training Assessment form with the new hire to understand what training is required for ultimate performance in the position. Refer to: EXAMPLE: " Training Assessment Form" template.
- ✓ Set objectives for the new hire to be reviewed just before the end of the probationary period.
- ✓ Provide the new hire with their phone card, credit card or mobile phone, if applicable.

# New Hire Orientation Checklist

## Information Technology Group (IT)

**Before the new hire's first day:**

- ✓ Ensure computer equipment is ready to go at least one day before the new hire starts (allow one week lead time).
- ✓ Have phone, direct dial number, voice mail, and email alias set up one week prior to the individual's start date. This way, useful information can begin to be emailed to the new hire before arrival.
- ✓ Email Office Services with the new hire's direct dial number and email alias as soon as possible so business cards can be ordered and the new hire can be added to the Company Directory.
- ✓ Add the new hire to appropriate email distribution lists. (Verify with the new hire's manager).
- ✓ Set up permissions for new hire to access the appropriate servers.
- ✓ The new hire's first day IT orientation meeting will be scheduled in advance by HR. Expect a meeting request.

**On the new hire's first day – IT Orientation Meeting:**

- ✓ Review login procedures, server information, software applications, phone system, internet, audio visual equipment, printers, faxes, photocopiers and applicable IT information relevant to the new hire's job function.
- ✓ Review the computer and network practices and IT information in the Company Handbook.
- ✓ Provide new hire with long distance access code.

# New Hire Orientation Checklist

## *Office Services (Or Administration)*

**Before the new hire's first day:**

- ✓ Work with the new hire's department Administrative Assistant to prepare the workstation for arrival and order workstation basic supplies.
- ✓ Obtain security cards.
- ✓ Obtain parking pass if applicable (check with Human Resources).
- ✓ Update office-seating maps.
- ✓ Order business cards using the EXAMPLE: "Business Card Order Form" template. Cards should be ready the day the new hire starts.
- ✓ HR will schedule the Office Services orientation meeting for the new hire in advance. Expect a meeting request.

**On the new hire's first day – Office Services Orientation Meeting:**

- ✓ Take the new hire on a tour of our facilities to familiarize him/her with the location of the staff room, coffee, kitchen supplies, washrooms, elevator times, supplies room, etc.
- ✓ Provide new hire with security cards, parking pass, business cards, etc.
- ✓ Review Office Services information in the Company Handbook.
- ✓ Take a digital photograph of the new hire for the Company directory.
- ✓ Ask the new hire to complete an EXAMPLE: " Individual Profile Form" template.

# New Hire Orientation Checklist

## Senior Human Resources Individual

**On the new hire's first day – Human Resources Orientation Meeting:**

- ✓ Meet with new hire to provide new hire kit and an orientation to the Company. Include a review of our incentive plan, organizational chart, culture, business overview and manager orientation (if applicable).
- ✓ Review the Company Handbook with the new hire. The section "About Us" and "Our Core Policies" document should be reviewed in detail. Make sure to go through the Company's Equal Employment Opportunity Statement as well as the Company's harassment and complaint procedure policies. A meeting room and projector would be ideal for this overview.
- ✓ Obtain a printed and signed copy of the new hire's receipt of acknowledgement of the handbook. This can either be a signed copy of the "Acknowledgement Form" or a confirmation email acknowledgement by the new hire.
- ✓ Go through the new hire's job description. Make sure the new hire understands their job description. (Ideally, have the new hire sign a printed copy of the job description.)

# New Hire Orientation Checklist

## Human Resources Administrator

**Before the new hire's first day:**

- ✓ Contact the new hire to set up first day's morning orientation and start time. Advise them that a picture will be taken of them for the Company directory.
- ✓ Schedule orientation meetings using meeting requests for the morning of the new hire's first day with Office Services, Senior HR Representative, IT and Payroll. Book the meeting rooms at the same time.
- ✓ Send the hiring manager a meeting request for the time after the HR, IT, Office Services, and Payroll orientation meetings are predicted to end. This will ensure that the Manager has blocked off time to spend with the new hire.
- ✓ Open an HR file for the new hire and include the individual's application for employment, resume and interview notes. Additionally, make sure that you have the new hire's signed handbook acknowledgement in the new hire's file and any additional signed documents.
- ✓ Obtain all applicable original paperwork signed by the new hire. The originals are filed in Payroll and a copy is placed in the new hire's HR file.
- ✓ Remove the job posting filled by the new hire from the Company website and other external advertising sources.
- ✓ Prepare new hire kit including: swag, Company reading material, Kleenex, a snack bar, and other items that would make the new hire feel welcome.

**During or after the new hire's first day:**

- ✓ Update the HR job postings spreadsheet, org chart, and HR database.
- ✓ **For Regular hires:** Send a meeting request to the hiring manager 2 weeks before the end of the employee's probationary period outlined in the employment contract, as a reminder to conduct a performance review.
- ✓ **For Temporary hires:** Send a meeting request to the hiring manager 2 weeks before the end of the individual's term as a reminder for decision to renew or wind down the new hire's term.
- ✓ Ensure the new hire is acknowledged at the next Company-wide meeting.

# New Hire Orientation Checklist

## Payroll

**Before the new hire's first day:**

- ✓ The new hire's first day payroll orientation meeting will be scheduled in advance by HR. Expect a meeting request.

**On the new hire's first day – Payroll Orientation Meeting**

- ✓ Meet with the new hire to provide payroll and benefits forms.
- ✓ Review benefits and payroll information in detail.
- ✓ Review Finance and Payroll information in the Company Handbook.

# Additional Information

### *Related Documents*

- ADD: Related documents and hyperlink as applicable
- 5635 Business Cards
- 5642 Business Card Order Form
- 7000 Recruiting and Hiring Process (Manager Resource)
- 7105 New Hire Orientation (Manager Resource)
- 7119 Training Assessment Form
- 7126 Template – Announcing New Employee

### *External Resources*

- ADD: Names, contact information or hyperlinks to external resources the reader may find useful in addition to this document.

If you have questions, comments or suggestions regarding this document, contact ADD: Contact name and email address.

**Customization Recommendations and Tips:**

- *Once customized, this document becomes a key checklist tool that is emailed to the Hiring Manager, IT Group, Office Services, HR, and Payroll as soon as the new hire's acceptance and arrival is confirmed.*
- *This form is built using Word Tables, so knowledge of how to modify Word Tables is required. To view the gridlines for easier customization, click on "Table", then "Show Gridlines".*

**Note: "Back to Table of Contents" shown on the 1st page of this document, should be hyperlinked to your handbook table of contents - or removed completely.**

**Note: The instructions and resources in this box are provided to help you customize this document and should be deleted before the document is released in your organization. Click on the border around this box to select it, then press "Delete".**