## **Onboarding Meeting Checklist**

Employee Name:

Hire Date:

Job Title:

Department: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Supervisor: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Preparation:** Once an offer has been accepted, make sure you:

* + Arrange computer access, log-ins/passwords to various applications, phone extension/password, cell phone, and assign other general office equipment.
  + Arrange for meetings with other staff (benefits, co-workers, close associates from other departments) and set meeting on all calendars so everything goes smoothly.
  + Get together your employee’s benefits paperwork, employee handbook, company property form, etc. ahead of time. You may choose to send employees a benefits packet/handbook ahead of time via email or snail mail.
  + Decide how you will celebrate the new employee and arrange for first day welcome, to potentially include email/intranet welcome.
  + Determine Onboarding Buddy and notify them (if you decide this is needed).

1. **Introduce the employee to their new role**

Review the following steps ahead of time (these may have to be covered over more than one day, depending on the complexity of the organization):

* + **Brief Welcome:** You want to get the employee “settled in” to their office; however, creating a welcoming atmosphere comes first. Before starting the day, do a brief walk-by or group introduction with close co-workers.
  + **Celebrate:** Welcome the new hire’s start with gift, welcome bouquet/signs, or however else you wish to welcome them. You may choose to have a small welcome party over the first few days, or just have co-workers stop by the office for treats.
  + **Tour:** Show the new employee his/her office or work area. Include showing them rest rooms, break rooms, copy rooms, fire exits and parking facilities.
  + **Technology:** Review the equipment provided to the employee; get company property sign-off if needed, provide employee with guide on phone, PC or laptop, fax, copy, etc.
  + **Team:** Provide a brief organizational chart, and make sure they have access to an employee directory/phone list. Discuss how the company's staff is organized and who handles various important areas like employee benefits—this is especially important in a small company where one employee may handle a variety of responsibilities.
  + **Training:** Inform the new hire of his/her training schedule, if appropriate.
  + **Buddy:** Introduce to Onboarding Buddy/Mentor if you have assigned one.

1. **Review compensation and benefits**
   * **Educate on Benefits:** Provide information on the company's employee benefits package, which may include health insurance, vision, dental and retirement plans. It is often helpful to send the employee benefits information pre-start date to allow employee to review.
   * **Enroll in Benefits:** Provide the opportunity for the new employee to sign up for benefits, ensuring that they have the opportunity to meet with the staff member (or outside resources) who can answer questions about benefits.
   * **Compensation Review:** Provide any additional compensation information, which may include the company's overtime policy, bonuses and any other financial incentives.
2. **Review the Employee Handbook & Policies**
   * Ensure the employee has received a copy of your employee handbook.
   * Obtain a written and signed 'Acknowledgement of Receipt' for handbook.

**Highlight the following handbook policies:**

* + Hours of work and overtime procedures (if appropriate to the position)
  + Lunch/break periods
  + Personal/business use of the phone, email, internet access, etc.
  + Confidentiality requirements, if appropriate
  + Appropriate attire
  + Safety guidelines and procedures for reporting injuries
  + Schedule of performance reviews (i.e., once a year)
  + Reimbursement of business-related expenses
  + Describe your company's paid time off, vacation, and/or sick leave policies.
  + Provide a list of holidays when the company is closed.
  + Explain the company's attendance/tardiness policy.
  + Describe any applicable leaves of absence required by law, such as FMLA

1. **Employee Responsibilities**
   * Discuss job responsibilities with the new employee. Provide a copy of job description.
   * Introduce the new employee to his/her team or department members.
   * Discuss how the employee's position relates to the growth and success of the company and any interaction with other departments or employees.
   * Be sure to show the new employee important areas of the office, including fire exits, break room, restrooms and parking facilities.

**SUPERVISOR: If you are not directly involved with your new hires training over the next few weeks, be sure to personally check in with your new hire at least twice during the first 2 weeks on the job regarding any questions or needs.**

**In addition to these first day responsibilities, you should have intermittent check-ins during the first 90 days and 1 year to help the employee understand how they are progressing towards goals and to determine any concerns or personal goals tied to the role.**

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Supervisor's Signature Date