



Employee Orientation Checklist

Preparation for First Day

- Send new hire a letter with needed paperwork. Include Organizational chart, dress code, employee handbook, benefits, pay explanation, glossary of company acronyms, etc. OR lead them to website where all these resources are located.
- Call new employee to confirm start date, time, location
- Prepare new employee's work area, including phone, computer, email, and any other access that may be necessary to make the productive from the start
- Meet with current team members about the new employee's role and responsibilities, talk about who will do what to welcome the new employee
- Appoint and orient a buddy
- Create lunch plans for the new employee's first few days
- Send an email, post an announcement about the new employee's arrival
- Make sure the employee is scheduled to have time with HR for any benefits, paperwork questions
- Order business cards, office name plate, etc.
- Make any arrangements for necessary on-the-job training or support, including software training or program manuals

First Day

- Personally welcome the new employee
- Review the orientation plan for the day, and the week, include any paperwork or exercises they may have completed prior to arriving.
- Introduce new employee to higher-level executives where possible. Allow executives to impart a company message.
- Explain the levels of supervision within the department
- Provide information needed for a successful introduction. Include
 - o Company history
 - o Mission & Vision statements
 - o Disciplinary procedures
 - o Complaint, discrimination and grievance procedures
 - o Proprietary information agreement
 - o Ethics statement, including solicitation and conflict of interest policies
 - o Security information
 - o Company Newsletter, brochures, marketing materials
- Should also include:
 - o Time sheet/card information
 - o Payroll procedures
 - o Normal work hours, break policies
 - o Insurance program
 - o Pension plan
 - o Educational assistance
 - o Credit union
 - o Stock purchase
 - o Savings bond plan
 - o 401(k)
 - o Performance Evaluations
 - o Promotions
 - o Transfers
 - o Vacation
 - o Holidays

- o Attendance policy regarding absences/tardiness
- o Jury duty
- o Leaves of absence
- Maternity leave/FMLA leave
- Complete introductions to team members and “buddy.” Be sure to include the job each person does and how it relates to the new employee’s job
- Show the new employee their new work area, review all components of phone, internet, email
- Give a tour, including restrooms, break room, emergency exits, conference rooms, etc.
- Escort the employee to get any parking passes, security badge, keys, company credit cards, other necessary equipment
- Make sure the employee has time to learn about benefits that are available to them
- Review any specific workplace security measures that are in place, as well as severe weather plans that are in place.
- Introduce the employee to additional staff members and departments where appropriate.
- Describe any regular meetings
- Demonstrate where company resources are and how they can access useful information such as staff directories, etc.
- Review office organization, where to find files, supplies, etc.
- Provide a list and brief explanation of all current department projects
- Give the initial work assignment (make sure its meaningful, not just busy work), provide any needed support up to and including step-by-step instruction
- Take the new employee to lunch
- Determine how supervisor is to reach employee during non-working hours if necessary
- Meet with new employee at end of day to find out how the day went and answer any questions, review the importance of the position and its accountability within the organization.

Second Day

- Review the online org charts, define the department’s function and interrelationships with other departments. Review protocols and reporting structures
- Review job description and performance standards: expected outcomes, success metrics, probationary period, etc,
- Impart the company’s customer service philosophies
- Review work schedule, lunch breaks, timekeeping systems as appropriate
- Describe who and how to notify of sick or vacation leave
- Discuss overtime needs and how assignments are given
- Review appearance and professionalism – mention online interactive exercises that demonstrate dress code, reiterate what is too casual. Review workspace neatness, decorating limits
- Review communications policy, including personal phone calls, appropriate email content, use of pagers, etc.
- Review policy on visitors and personal conduct
- Review policy on after-hours and weekend access
- Review procedures for security, privacy & handling of confidential information
- Review potential safety issues they may encounter
- Review Ethical guidelines concerning meals, gifts, travel, entertainment as necessary.

First Week

- Begin the performance planning process
- Review the employee's work area to make sure they have everything they need to do their job
- Meet with the new employee (and possibly their buddy) at the end of each day to review, answer questions
- If needed, review travel policies and procedures
- Explain safety policy, reporting of all accidents and injuries (when, to whom, and how), first aid facilities, emergency medical attention
- Explain the company's unique selling proposition
- Explain the company's products and services
- Explain the company's customers, clients, vendors, and competitors

Within the First Month

- Check to make sure employee has signed up for benefits
- Review teamwork expectations
- Establish performance goals and schedule first performance appraisal meeting (at 6 weeks or per requirements)
- Make sure the employee understands the relationship between his/her job and the company's success
- Insure technical competence, make sure any questions asked have been thoroughly answered.
- Review current departmental goals (if they exist) for the next 90 days, 6 months and 1 year
- Review any community involvement projects or volunteer opportunities available for the new employee

90 Days and Ongoing

- Celebrate the completion of probationary period
- Schedule periodic progress reviews. Discuss orientation items, ask for feedback on the process. Allow them to ask any and all questions they may have, either in person or anonymously.
- Review departmental goals and success benchmarks
- Review performance expectations
- Meet regularly with new employees to answer questions and confirm that the new employee is becoming acclimated to the department and position responsibilities
- Schedule training as necessary

PROJECTIONS

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