



New Employee Onboarding Checklist

Take the following steps to help ensure smooth onboarding of all new employees:

- ☐ Schedule new hire orientation.
- ☐ Set-up or order equipment and technology items (computer, phone, keys, etc.).
- ☐ Prepare the following new hire documents:
 - ☐ Offer letter and job description.
 - ☐ Form I-9.
 - ☐ Form W-4.
 - ☐ Confidentiality agreement.
 - ☐ Emergency contact information.
 - ☐ Benefit enrollment forms.
 - ☐ Employee handbook.
 - ☐ Direct deposit form.
 - ☐ Organizational chart.
 - ☐ Phone list and office map.
 - ☐ Safety instructions.
 - ☐ Personnel action form.
 - ☐ State-required new hire pamphlets.
 - ☐ Other state or local documentation requirements.
 - ☐ Any other materials a new employee would find useful on the first day.
- ☐ Conduct new hire orientation/onboarding process with the following steps:
 - ☐ Review and discuss new hire paperwork.
 - ☐ Schedule or conduct safety training.
 - ☐ Provide tour and introductions with manager.
 - ☐ Provide information on company logistics, including workstation location, break rooms, and restrooms.
 - ☐ Provide instructions for phone and computer access.
 - ☐ Sign agreements for security access and keys.
 - ☐ Explain timekeeping requirements.
 - ☐ Explain organization structure and provide a chart.
 - ☐ Discuss company mission, vision, values and goals.
 - ☐ Schedule time for the employee to read and sign the handbook.
 - ☐ Describe company products and services.
 - ☐ Describe benefits of working at the company (employee benefits, job opportunities, etc.).
- ☐ Upon submission, review new hire paperwork for completeness and accuracy.
- ☐ Create personnel and confidential file folders.
- ☐ Process new hire paperwork as needed and update human resource information system.
- ☐ Provide payroll with a copy of the employee's Form W-4, direct deposit information (if applicable) and other necessary information.
- ☐ Working with benefit providers to enroll employee in elected benefits.
- ☐ Schedule first day lunch with manager or co-workers, and assign an onboarding "buddy" to help the new employee get acquainted with the company.

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The information contained in this document was provided by HR Services.



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