

# Onboarding Checklist

## New Employee Information

Complete with employee and distribute copy to employee and onboarding sponsor.

(Customize to your department's policies and practices)

Employee Name: [Click to enter text.](#)

Manager/Supervisor Name: [Click to enter text.](#)

Onboarding Sponsor's Name: [Click to enter text.](#)

	Responsibility	Due Date	Completed
<b>Prior to New Employee's Arrival</b>			
<b>Goal:</b> To ensure new employee feels welcomed and comfortable in new position.	Assign one: Manager/Supervisor or Sponsor		
Maintain communication with new employee. <ul style="list-style-type: none"><li>• Notify employee of any delays in the hiring process.</li><li>• Welcome letter/confirmation email and additional resources.</li><li>• Confirm work schedule, salary and report date.</li><li>• Arrange 1st day orientation meeting with manager/supervisor and onboarding sponsor.</li></ul>		Click here to enter a date.	<input type="checkbox"/>
Assign an onboarding sponsor to new employee to establish successful integration into the new organization.		Click here to enter a date.	<input type="checkbox"/>
Prepare a Welcome Packet, a sample is available on the Onboarding Program Resources webpage, and resources to help transition into the new job.		Click here to enter a date.	<input type="checkbox"/>

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Submit requests for new employee logistics: <ul style="list-style-type: none"> <li>▪ Building logistics:               <ul style="list-style-type: none"> <li>○ Badge/ID/building access.</li> <li>○ Parking/commuting options</li> </ul> </li> <li>▪ Workstation:               <ul style="list-style-type: none"> <li>○ Computer, email, network access for Internet/Intranet, system and training accounts.</li> <li>○ Telephone, have employee added to distribution lists.</li> <li>○ Standard office equipment and supply package.</li> </ul> </li> <li>▪ Any reasonable accommodation requirements.</li> <li>▪ Any other department-specific items.</li> </ul>		Click here to enter a date.	<input type="checkbox"/>
Prepare department/unit staff for new employee's arrival (background, role, responsibilities) email introduction, schedule meetings for employee's first week.		Click here to enter a date.	<input type="checkbox"/>
Register employee for new employee orientation or any mandatory and job related training; develop overall onboarding plan outlining action items with completion dates and training schedule.		Click here to enter a date.	<input type="checkbox"/>
<b>First Week</b>  <b>Goal:</b> Provide resources to establish immediate connectivity to staff, workplace and department structure and goals. Clarify expectations and job responsibilities.	Assign one: Manager/Supervisor or Sponsor		
Welcome and introduce employee to fellow team members and onboarding sponsor. (Recommended first day.) <i>Helpful hint: Consider a welcoming activity, treats, plant/gift, etc. For additional ideas see more Helpful Hints on the Onboarding Program Resources webpage.</i>		Click here to enter a date.	<input type="checkbox"/>
Provide employee's badge, office keys, and discuss visitor protocol. (Recommended first day.)		Click here to enter a date.	<input type="checkbox"/>

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Escort employee to work space, orient to immediate work area, provide employee a building map, and arrange for a tour of building/organization (recommended first day).		Click here to enter a date.	<input type="checkbox"/>
Review welcome packet, a sample is available on the Onboarding Program Resources webpage, with employee and fill out applicable forms (recommended first day). The Welcome Packet Checklist contains ideas and suggestions: <ul style="list-style-type: none"> <li>▪ Mission, Vision &amp; Core Values</li> <li>▪ Department &amp; Building Map</li> <li>▪ Copy of Duty Statement</li> <li>▪ Disaster Service Worker Expectations (Government Code § 3100-3109)</li> </ul> Find additional information on <a href="#">Disaster Service Worker Expectations</a> visit the Sacramento County website. The link is also on <a href="#">CalHR's Onboarding Program Resources webpage</a> under Additional Resources.		Click here to enter a date.	<input type="checkbox"/>
Ensure employee is scheduled for an appointment with personnel representative (Recommended first day.): <ul style="list-style-type: none"> <li>▪ Review benefit information, timelines, direct deposit, and complete necessary forms.</li> <li>▪ Show employee how to access CalHR website and/or departmental website for <a href="#">New Employee Orientation</a>.</li> </ul>		Click here to enter a date.	<input type="checkbox"/>
Review Organizational Structure (e.g., strategic plan, vision, mission, values, goals, objectives, organization chart, key staff, reporting relationships: State, Agency, Department, Division, Unit).		Click here to enter a date.	<input type="checkbox"/>
Show where to locate departmental policies (sexual harassment, security, etc.) and review policies relevant to employee's position.		Click here to enter a date.	<input type="checkbox"/>
Review workplace safety (include emergency, basic first aid, injury reporting, workers compensation, evacuation route, workstation set up and ergonomics, etc.).		Click here to enter a date.	<input type="checkbox"/>

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<p>Discuss standard operating procedures:</p> <ul style="list-style-type: none"> <li>▪ Work/lunch/break schedules, absence requests/reporting, overtime, telework, travel policy, etc.</li> <li>▪ Desk procedures and resources, Intranet portal, directory of drives, document naming conventions, overview of department equipment, applications, and systems.</li> </ul>		Click here to enter a date.	<input type="checkbox"/>
Discuss employee's job role and responsibilities, performance expectations, and initial work assignments. Review and sign duty statement and provide employee a copy of the duty statement. Discuss the probationary period and evaluation process. If department has an award or recognition program, provide details. Set expectations for both new employee and hiring manager.		Click here to enter a date.	<input type="checkbox"/>
Identify success factors: knowledge, skills, abilities, and behaviors that will help employee function effectively in work environment.		Click here to enter a date.	<input type="checkbox"/>
Discuss professional standards, office etiquette, dress code, ethics, and general office culture.		Click here to enter a date.	<input type="checkbox"/>
Meet with employee to review employee's training plan – include mandatory and on-the-job training and how to request training, and/or provide training policy.		Click here to enter a date.	<input type="checkbox"/>
Introduce new employee to other relevant work teams and senior staff (provide contact information). Ensure that employee has met all key department heads, customers, and key internal and external stakeholders important for job function.		Click here to enter a date.	<input type="checkbox"/>
Structure 1-2 assignments that allow employee to apply his or her past expertise to make an immediate contribution to the organization.		Click here to enter a date.	<input type="checkbox"/>
Hold a "Check-In" meeting with employee at the end of the week to discuss progress and address questions. Refer to Conversation Guide.		Click here to enter a date.	<input type="checkbox"/>

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<p>Schedule regular one-on-one meetings to provide performance feedback, address questions, and ensure continued building of knowledge. Refer to Conversation Guide.</p> <p><i>Helpful hint: Consider scheduling a team building lunch to help new employee integrate into office culture. For additional ideas see more Helpful Hints on the Onboarding Program Resources webpage.</i></p>		Click here to enter a date.	<input type="checkbox"/>
<p><b>First Month</b></p> <p><b>Goal:</b> Ensure timely opportunities for feedback and development. At this point employee should understand role and responsibilities; ensure development of team and business relationships.</p>	Assign one: Manager/Supervisor or Sponsor		
Ensure that employee is scheduled for or has attended new employee orientation (NEO).		Click here to enter a date.	<input type="checkbox"/>
Ensure that time-sensitive HR forms (e.g., health benefits) and policy acknowledgement forms have been signed and submitted to HR.		Click here to enter a date.	<input type="checkbox"/>
Ensure that employee is included in appropriate department and unit meetings.		Click here to enter a date.	<input type="checkbox"/>
Identify employee's assignments, resources, completion dates, and success measures. Acknowledge and recognize accomplishments and milestones.		Click here to enter a date.	<input type="checkbox"/>
Maintain regular one-on-one meetings to provide performance feedback, address questions, and ensure continued building of knowledge. Refer to Conversation Guide.		Click here to enter a date.	<input type="checkbox"/>
Provide training, as needed, to help employee understand internal systems and operating practices and obtain information & skills required for job performance.		Click here to enter a date.	<input type="checkbox"/>

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<p>If your department offers an anonymous evaluation regarding onboarding processes, provide an opportunity for employee to provide their feedback.</p> <p><i>Helpful hint: Consider scheduling a team building meeting and exercise to continue integration and assimilation into unit and departmental culture. For additional ideas see more Helpful Hints on the Onboarding Program Resources webpage.</i></p>		Click here to enter a date.	<input type="checkbox"/>
<p><b>First 3 to 6 Months</b></p> <p><b>Goal:</b> Identify task and behavior specific opportunities for growth opportunities; provide frequent feedback and resources for staff development. Increased competencies should reflect in independent work. Continue to monitor performance and provide feedback.</p>	Assign one: Manager/Supervisor or Sponsor		
Schedule first probation report. (Schedule 2nd, 3rd, and final probation report meetings).		Click here to enter a date.	<input type="checkbox"/>
Evaluate employee's work on a regular basis – provide ongoing feedback, answer questions.		Click here to enter a date.	<input type="checkbox"/>
Provide increasingly challenging projects as appropriate so employee can develop skills and manager can assess employee's skills.		Click here to enter a date.	<input type="checkbox"/>
Assure employee has needed support and resources.		Click here to enter a date.	<input type="checkbox"/>
Continue to identify milestones, completion dates, and success measures. Acknowledge and recognize accomplishments and milestones.		Click here to enter a date.	<input type="checkbox"/>

	Responsibility	Due Date	Completed
Maintain regular one-on-one meetings to provide performance feedback, address questions, and ensure continued building of knowledge. Refer to Conversation Guide.		<a href="#">Click here to enter a date.</a>	<input type="checkbox"/>
Provide training, as needed, to help employee understand internal systems and operating practices and obtain information and skills required for job performance.		<a href="#">Click here to enter a date.</a>	<input type="checkbox"/>
At the end of a six-month probationary period, conduct final probation report meeting with employee. Provide and ask employee for feedback. Congratulate employee on passing probation.		<a href="#">Click here to enter a date.</a>	<input type="checkbox"/>
<b>First Year</b>  <b>Goal:</b> Ensure employee has been provided feedback, resources and opportunities to develop skills and meet performance criteria. Provide continued guidance and establish goals for employee's future.	Assign one: Manager/Supervisor or Sponsor		
Assess performance periodically and provide ongoing feedback. Continue to provide challenging assignments utilizing employee's strengths and to help employee develop skills.		<a href="#">Click here to enter a date.</a>	<input type="checkbox"/>
Identify training opportunities and ensure that employee is completing mandatory trainings. Implement the Individual Development Plan to address skill gaps and develop skills.  <i>Helpful hint for future: Ask employee to prepare draft self-evaluation for performance review discussion. For additional ideas see more Helpful Hints on the Onboarding Program Resources webpage.</i>		<a href="#">Click here to enter a date.</a>	<input type="checkbox"/>
Schedule regular check-in meetings to provide performance feedback, address questions, and ensure continued building of knowledge.		<a href="#">Click here to enter a date.</a>	<input type="checkbox"/>

	Responsibility	Due Date	Completed
Provide training, as needed, to help employee understand internal systems and operating practices and obtain information and skills required for job performance.		<a href="#">Click here to enter a date.</a>	<input type="checkbox"/>
At the end of a one-year probationary period, conduct final probation report meeting with employee. Provide and ask employee for feedback. Congratulate employee on passing probation.		<a href="#">Click here to enter a date.</a>	<input type="checkbox"/>

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