

Onboarding Checklist

The following checklist is to be used to safeguard access to confidential information when employment begins as well as outline the general process for new employees.

Onboarding Checklist	
<i>Document of Record for onboarding a new workforce member or consultant.</i>	
Name	Date of Onboarding
Title	
Relationship	<input type="checkbox"/> Employee or <input type="checkbox"/> Consultant

General	
<input type="checkbox"/> Setup employee's payroll and tax forms.	HR / COO
<input type="checkbox"/> Issue appropriate equipment and items: Workstation, mobile phone, credit card, etc.	Supervisor
<input type="checkbox"/> Setup employee's access to facility and notify employee of related policies and procedures.	Supervisor
Training	
<input type="checkbox"/> HIPAA Training	Privacy Officer
<input type="checkbox"/> Policies and Procedures	Privacy Officer
<input type="checkbox"/> Employee Handbook	Employee
<input type="checkbox"/> Responsibilities and acceptable behavior with workstation and other devices.	Privacy Officer
<input type="checkbox"/> Remote workforce training including risks, controls, and responsibilities.	Privacy Officer
Information Systems	
<input type="checkbox"/> Grant Employee access to Google Apps (email, calendar, gDrive, etc).	Security Officer
<input type="checkbox"/> Grant Employee access to Github.	Security Officer
<input type="checkbox"/> Fill out System Access Request Form as needed.	Employee
<input type="checkbox"/> Grant access to systems after System Access Form reviewed and approved.	Security Officer
<input type="checkbox"/> Add Employee to appropriate Calendar Invites	Supervisor

Authorization <i>(to be filled out by Privacy Officer and/or Security Officer)</i>	
Name Completed By	Date:
Title	