Onboarding Checklist: First Day (Or Week)

(Many of these tasks can be shared between the supervisor and a lead staff/mentor/trainer within the unit.)

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| **TASK** | **WHO WILL COMPLETE**  | **DONE** |
| Send out a “welcome” email introducing the new staff |  | [ ] YES [ ]  NO |
| Make sure new staff will be greeted and escorted to workstation |  | [ ] YES [ ]  NO |
| Help new staff secure their badge |  | [ ] YES [ ]  NO |
| Give the new staff a tour of the office and introduce him/her to unit and administrative staff |  | [ ] YES [ ]  NO |
| Introduce new staff to supervisor’s boss |  | [ ] YES [ ]  NO |
| If new to state service, escort new staff to HR to complete required paperwork  |  | [ ] YES [ ]  NO |
| Explain how to operate phone system  |  | [ ] YES [ ]  NO |
| Make sure Desktop Support has shown the new employee how to log on, etc. |  | [ ] YES [ ]  NO |
| Go over duty statement and secure employee’s signature |  | [ ] YES [ ]  NO |
| Go over supervisor expectations, management style, and applicable policies |  | [ ] YES [ ]  NO |
| Discuss the organizational culture and how their position specifically helps to accomplish the mission of the Department |  | ☐YES ☐ NO |
| Discuss who should be called in case of illness or tardiness |  | [ ] YES [ ]  NO |
| Discuss who to go to for help if supervisor is absent or unavailable |  | [ ] YES [ ]  NO |
| Discuss assigned work hours, break times, and lunch schedule  |  | [ ] YES [ ]  NO |
| Show location of general office supplies and inform who to contact if something is needed |  | [ ] YES [ ]  NO |
| Provide a tour of the entire building if not already done; inform about local amenities (restaurants, shopping, etc.)  |  | [ ] YES [ ]  NO |
| Show the new staff where fire escapes, exits, and first aid kits are |  | [ ] YES [ ]  NO |
| Discuss any up and coming projects the new staff will be involved in |  | [ ] YES [ ]  NO |
| Introduce the new staff to his/her assigned trainer/mentor |  | [ ] YES [ ]  NO |
| Inform staff that an Onboarding Plan will be discussed with them within the next week |  | [ ] YES [ ]  NO |
| Show staff the (insert name of your department’s Intranet) and encourage/ allow time to review key documents which will assist with onboarding (i.e. Strategic Plan, Contacts, Policies/Procedures, User Guides, etc.)  |  | [ ] YES [ ]  NO |

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