Onboarding Checklist

**Before the First Day**

* Make sure that you’ve prepared staff responsible for onboarding and training, laying out your expectations.
* Create an Orientation Guidebook or Employee Handbook (see the Employee Handbook template in the Downloadable Resources section of the HR Toolkit).
* Determine and prioritize training needs for the job.
* Send a reminder email to the hiring and training managers. Outline what should be covered in the orientation.
* Let other staff know that a new employee is starting.
* Make sure the work station and materials such as uniforms, safety equipment, IT, and software are ready for the first day.
* Send an email to the new hire to outline basic information that will make their first day more comfortable like start time, who will greet them, location (if different from the interview site), parking information, whether there is a kitchen and fridge or local restaurants, and dress code.

**On the First Day**

* Give the new employee a warm welcome.
* Provide a copy of your Employee Handbook (see an Employee Handbook template in the Downloadable Resources section of the HR Toolkit). Take time to discuss the company’s culture, values (what's important to you), vision and mission
* Review important policies such as workplace safety and enforcement, security and emergency procedures, work start and end times, lunch hours and breaks, use of personal cell phones and iPods, and social media.
* Walk through the work facilities and show the new employee their work station or site, common areas, safety equipment, break and washroom facilities, office supplies, and anything else that is important for their work.
* Introduce the new hire to their coach and peers. Ideally partner him/her with a peer who can help answer questions.
* Complete the paperwork: TD1's for proper income tax, EI premiums, and CPP premiums deductions and payroll forms, including banking information if using direct deposit, and benefit program signup if applicable.

**Beyond the first day**

* Streamline and limit any administrative work.
* Provide preliminary training and set up a longer-term training plan.
* Share team and individual goals, priorities, and success criteria.
* Provide a safe mechanism for new employees to ask questions.
* Plan on having regular check points for the first while.