**Onboarding Checklist**

**Employee Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Department:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Manager Name:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Hire Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*To be completed within three days of the employee’s start date.*

**Introduction to the Company**

☐ Organization overview

☐ Corporate culture

☐ Company mission

☐ Corporate literature/video

☐ Organizational chart

**Pre-hire Paperwork**

☐ Application form

☐ Authorizations for background check, physical & drug screen

☐ Offer letter signed

☐ I-9 form

☐ Reference checks completed and filed

☐ Background check results received and reviewed

☐ Physical exam results received and reviewed

☐ Drug test received and reviewed

**New Hire Paperwork**

☐ Federal tax withholding form

☐ State tax withholding form

☐ Direct deposit form

☐ I-9 documents reviewed

☐ Job description provided to employee

☐ Orientation documents filed

☐ Employee handbook acknowledgement

☐ Key/security/device policies acknowledgement

☐ Employee personal information sheet and emergency contact form

☐ Benefit enrollment forms

**Benefits and Compensation**

☐ Health, life, disability insurance

☐ Retirement benefits

☐ Dependent care FSA

☐ Educational assistance

☐ Employee assistance program

☐ Pay procedures

☐ Salary increase/performance review process

☐ Incentive/bonus programs

☐ Paid and unpaid leave

**Administrative Procedures**

☐ Personnel file created

☐ E-Verify completed

☐ Employee information entered in HRIS & payroll systems

☐ State new hire reporting completed

☐ Office/desk/workstation

☐ Computer username and password

☐ E-mail

☐ Keys/access card

☐ ID badge

☐ Business cards

☐ Purchase requests

☐ Telephones

☐ Conference rooms

☐ Expense reports

**Key Policy Review**

☐ Anti-harassment/discrimination

☐ Vacation and sick leave

☐ FMLA/leaves of absence

☐ Overtime

☐ Dress code

☐ Personal conduct standards

☐ Progressive discipline

☐ Security

☐ Confidentiality

☐ Safety

☐ Injury reporting

☐ Emergency procedures

☐ E-mail and Internet usage

**Introductions and Tours**

☐ Department staff and key personnel

☐ Tour of facility, including:

Restrooms

Mailroom

Copy centers, printers, fax machines

Bulletin board

Parking

Office supplies

Break rooms

Emergency exits

**ACKNOWLEDGMENT: *(to be signed upon completion of all orientation items)***  
  
Employee: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_  
  
Manager: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_

***Return original to Human Resources - Copies to Manager and Employee***