

# Checklist for New Hires

Now that you've hired a new employee you want to make sure they are joining your business as smoothly as possible and will become productive as soon as possible. So what should you do when that new employee is about to start and are in their first phases of employment? Below are checklists for three separate stages for a new hire – [Pre-Arrival](#); [First Day](#); [First Week](#); and [First Month](#).

## PRE-ARRIVAL PREPARATION:

- Announce to existing employees that a new person has been hired for position. Explain what their role will be and how they will fit into the organizational structure. It is best to start with telling your senior management team, those who will be working most closely with the person, and then the entire staff. The announcements should be made in quick succession to minimize rumours and speculation.
- Develop an orientation process and information package for the new hire. Think about what you would want to know if you never set foot into the business before. Simple things like the location of bathrooms, lunch room, or sign in procedures, or common jargon are easily missed. When they are part of the everyday we forget how much we rely on this information.
- Pre-schedule meetings for the new employee with existing staff members for training during the first week of employment and beyond. Rather than letting the employee "ease into" their new surroundings on their own, scheduled meetings are essential to make meaningful connections with coworkers.
- Ensure equipment and surroundings are acceptable and ready. If it is an office job, is there a desk, phone and other equipment in working condition and ready to be used? Do you have instructions prepared to set voice mail? If it is an on-site job, are tools allocated to the new hire? Has the person's driver's abstract been sent to the insurance carrier if they are going to use company vehicle? If there is a uniform, did you get the person's size when the job was offered and has it been ordered? Are there keys or security codes readily available?
- Computer and systems checklist (if applicable):
  - Set up computer for new employee
  - Instructions for logging into computer
  - Create e-mail account and address
  - Add new employee's name to the appropriate e-mail distribution lists (if applicable)
  - Set-up email account
  - Set-up appropriate calendar views/sharing (if applicable)
  - Map the employee's computer to the appropriate drives on the IT system (if applicable)
  - Set up a date and time to conduct a brief one on one training on applicable email, digital calendar, "signature" set up, and any other basic IT training (if required / applicable)
  - Show employee how to get to and use the organization's intranet (if applicable)
  - Add new hire's name/position to the organizations website (if applicable)

*\*Please note that this is not a full list and that every situation is different.*

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- Install any programs needed for the position (e.g. Skype, Power Point, Publisher, programming software, etc.)
  
- Ensure the new employee's name is updated on any organization telephone / e-mail lists. Making a new employee's contact information available to all in the organization will lessen the risk of isolating this person. If existing employees do not know how to reach the new person, integration will be stunted.
  
- Ensure business cards are ordered in advance (if applicable). Make sure that any designations for the hire are correct and displayed appropriately.
  
- Ensure name badge/tag is ordered to distribute on first day of work (if applicable).
  
- Ensure office furniture is appropriate and clean. Yes, please make sure that things are clean.

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## NEW EMPLOYEE'S FIRST DAY:

- Conduct brief tour of department/building and show location of restrooms, lunch rooms, kitchens, etc.
- Review general office procedures and protocols (work hours, expectations, lunch break times and duration, etc.)
- Discuss procedures for requesting time off, calling in sick or late, etc.
- Discuss job training schedule and any other pertinent information employee will learn on new job. Give a realistic time frame for learning expectations.
- Review the following (if applicable):
  - Sign confidentiality agreement (if applicable)
  - Complete emergency contact form
  - Provide map of offices, including co-workers' names and office locations (if exists)
  - Discuss parking options
  - Provide most updated versions of phone and e-mail distribution lists
  - Provide name tag (if applicable)
  - Provide information on how to sign up for payroll, benefits, etc.
  - Discuss general dress code
  - Discuss internal communication methods
  - Probationary period and performance management
- If building is secure, ensure the appropriate cards/keys are programmed to give employee building access
- Make sure phone is in working order
- Review voicemail set up and provide "quick tips" – help employee set up voicemail, train on phone features (i.e. how to forward a call or voicemail, etc.)
- Introduce employee to their colleagues
- Distribute:
  - Office keys (if applicable)
  - Business cards (if applicable)
  - Any employee HR manual or procedures

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## NEW EMPLOYEE'S FIRST WEEK OF EMPLOYMENT:

- Review the organization's function, mission, vision, and culture (if available)
- Ensure the employee understands the relationship between their job, the department (if applicable), the organization and external entities (vendors, partners, customers, etc.)
- Describe customer/client service expectations
- Explain any remaining department policies or work rules not reviewed on the first day of employment

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## NEW EMPLOYEE'S FIRST MONTH OF EMPLOYMENT:

- Meet regularly with the employee to answer questions and ensure they are becoming acclimated to the department and position's responsibilities
- Establish performance goals with the new employee
- Ensure the new hire has signed up and made all of their benefit elections
- Encourage the employee to visit all areas of the business and learn more about entire operation

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