



Orient New Hires Checklist

When to Use

This checklist can assist employers in preparing for and conducting a new hire orientation. Employers do not have to complete the following steps in sequential order to properly complete the checklist. All of the items on the checklist may not be applicable to every employer. However, employers should at least be aware of the following information.

Customizable Checklist

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1. Introduce the Employee to the Workplace

- € Welcome the employee to the organization and express pleasure that the employee has joined the organization.
- € Explain to the employee the orientation plan for the day, including activities, information to be distributed and the overall schedule, so the employee knows what to expect.
- € Arrange in advance for someone to have a casual lunch with the new employee that allows the new employee to ask any questions about the information they have obtained so far or about the organization in general.
- € Take the employee on a tour of the workplace, highlighting areas relevant to the employee's job duties or common spaces and all emergency exits on the employee's floor.
- € Introduce the new employee to co-workers they will have the most contact with, including any support staff they will need to interact with to accomplish their job duties, such as file clerks, assistants, copy room staff and security personnel.
- € Provide the employee with all relevant paperwork to be completed, including a benefits package.
- € Be sure to discuss any questions the employee has about the package or refer the employee to someone who can answer their questions.

2. Provide the Employee with Workplace Information

- € Inform the employee how they can obtain support, equipment, tools and supplies necessary for the job.
- € Provide the employee with time to get familiar with their workspace and any equipment provided.
- € Assist the employee in setting up email and voicemail accounts.
- € Explain the use of the parking facilities, including any relevant security measures required to enter or exit the premises.
- € Provide the employee with any necessary identification and passwords required to execute their job duties or use office facilities, including security badges, computer passwords or keys to restrooms.



- € Explain the employer's policy regarding expenses, including how to complete expense reports and who they should be submitted to and when.
- € Explain any expectations or restrictions related to the employee's personal use of employer provided equipment, including but not limited to computers, network systems and telephones.
- € Explain any restrictions related to the use of personal cellular phones during work hours.
- € Review all relevant emergency evacuation procedures with the employee.
- € Show the employee where to locate any records or files needed in performing their job duties.
- € Explain policies regarding working hours, breaks, overtime, time reporting systems and flexible work options if applicable.
- € Clarify vacation, sick time, PTO and holiday policies with the employee.
- € Instruct the new employee about facility rules and how to schedule conference rooms or borrow equipment.

3. Clarify the Employee's Job Responsibilities

- € Review the employee's job description and answer any questions they may have.
- € Inform the employee who to direct any future questions to regarding their job duties.
- € Explain how the employee's position fits structurally within the department and organization.
- € Identify those employees the new employee will be working most closely with and how their job functions are related.
- € Review the organization's written statement to familiarize the employee with the employer's ultimate goals.
- € Provide the employee with a copy of the relevant organizational chart.
- € Describe a typical day on the job to the employee.
- € Describe how success is measured for the job and how the employee will be evaluated.

4. Provide the Employee with the Employee Handbook and Workplace Policies

- € Review the employee handbook with the employee and have the employee sign the acknowledgement of receipt form.
- € Encourage the employee to review the handbook in greater detail at a later date.
- € Provide the employee with information on any department specific policies or procedures relevant to job.
- € Review the organization's confidentiality policy and stress the importance of the same.
- € Review the employer's harassment, discrimination and retaliation policies, and inform the employee how to report any such complaints.



- € Review the employer's dress code policy and highlight any rules related to the employee's safety.
- € Discuss the employer's attendance policies.

5. Arrange Training

- € Schedule training related to the employee's workstation and equipment for the workplace environment, such as computer and software, telephone, security, billing and time records, copy machines, fax machines, scanners and postage meters.
- € Plan compliance training, including training on harassment, discrimination, ethics, safety and conflicts of interest.

6. Develop the Supervisor-Employee Relationship

- € Explain the supervisor's responsibility and how the employee's new job supports the department's functions.
- € Discuss how the supervisor and the employee will communicate and what the communication expectations will be.
- € Discuss how to manage feedback.
- € Determine how to contact the employee during non-work hours if necessary.

7. Clarify Next Steps

- € Answer any questions the employee has or put the employee in contact with the appropriate individual to answer the employee's questions.
- € Confirm and explain the employee's schedule of required training to take place in the following days.
- € Provide the employee with any information about meetings and events on employee's calendar.
- € Periodically check in with the new employee during the first weeks of employment.