Onboarding Checklist

|  |  |
| --- | --- |
| Employee Name | Enter Employee Name |
| Department / Title | Enter Dept. and Title |
| Start Date | Select Date |

# **Pre-Boarding**

|  |  |  |  |
| --- | --- | --- | --- |
| Employment Contract | Due Date | Responsibility | Complete |
| * Send Contract to new hire for review | Select date | Enter name |  |
| * Arrange meeting to review and sign contract | Select date | Enter name |  |
| * Set start date | Select date | Enter name |  |
| Orientation Day Planning |  |  |  |
| * New hire announcement to department manager | Select date | Enter name |  |
| * Assemble new hire package details * Employee codes * Job description * License details (if applicable) * Payroll/Tax forms * MSP and Benefits enrolment * Code of Conduct / Employee handbook * Legal forms (e.g. non-disclosure) * Orientation package | Select date | Enter name |  |
| * Assemble Orientation package * Office directory, maps, phone directory * Office intranet site directory * Organizational chart and directory * Online training requirements | Select date | Enter name |  |
| Workplace Setup |  |  |  |
| * Arrange and set up workspace furniture | Select date | Enter name |  |
| * Add new hire to internal directories and intranet | Select date | Enter name |  |
| * Arrange access: keys, fobs, parking passes | Select date | Enter name |  |
| * If applicable: arrange parking space | Select date | Enter name |  |
| Technical Set Up |  |  |  |
| * Computer with company internet/intranet access and sign-on, email address | Select date | Enter name |  |
| * Printer and equipment access | Select date | Enter name |  |
| * Set up and activate company phone | Select date | Enter name |  |
| * Arrange mobile phone order (if applicable) | Select date | Enter name |  |

Onboarding Checklist

# **On or after the start date**

|  |  |  |  |
| --- | --- | --- | --- |
| Employment Contract | Due Date | Responsibility | Complete |
| * Complete new hire data and set up in payroll/HR:   + Start date, Salary, Compensation * Department and title * SIN, Date of Birth * Address, Email * Emergency Contact info | Select date | Enter name |  |
| * Arrange to receive a void cheque from new hire | Select date | Enter name |  |
| * Business card order | Select date | Enter name |  |
| * Validate SIN | Select date | Enter name |  |
| * Have employee complete benefit enrolment forms (to be filed until satisfies waiting period) | Select date | Enter name |  |
| Workspace |  |  |  |
| * Equip workspace with office supplies | Select date | Enter name |  |
| * Provide contact information for computer, online safety, compliance training | Select date | Enter name |  |
| Workplace Safety |  |  |  |
| * Review / provide company safety policy, code of conduct, evacuation procedures | Select date | Enter name |  |
| * Identify safety equipment and procedures | Select date | Enter name |  |
| * If applicable: Administer safety testing | Select date | Enter name |  |
| First Day |  |  |  |
| * Schedule first day activities and introductions   + Team / Office greeting committee * Provide orientation and new hire package * Provide office, building tour * Send out new hire announcement * Arrange team lunch * Provide training plan | Select date | Enter name |  |
| Mentorship |  |  |  |
| * Assign a peer mentor for first week, with scheduled tasks and shadow assignments | Select date | Enter name |  |
| * Schedule check-in meetings: * 1 day, 1 week and 30, 60, 90 days, 6 months, 1year post hire * Provide manager with check-in assessments | Select date | Enter name |  |