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 |[ ]