

## **Onboarding check list sample #1:**

### **Department/Payroll Info**

- W-4 Federal form completed and sent to Payroll
- W-4 State form completed and sent to Payroll
- Patent Policy Form
- Conflict of Interest policy statement
- Ensure employee has accessed the Employee Link to confirm Personal Data and to provide Emergency Notification Contact
- Confirm with employee the name and phone number of Employee Relations Representative

### **Human Resources**

- Complete I-9
- Conflict of Interest Employment Form completed
- ID number issued by Human Resources
- New Employee Orientation scheduled by HR for \_\_\_\_\_

### **Access Information**

- Establish Email account
- Establish access to appropriate PC access and files
- Provide access to Company Intranet
- Passwords issued
- Establish phone extension
- Activate voicemail
- Provide long distance access code
- Add employee's name to any email group lists, distribution lists, internal/office phone lists and/or website

### **Departmental Orientation and Office Access**

- Inform staff of employee's arrival
- Set up and clean office space
- Obtain office supplies
- Establish training schedule
- Establish office mailbox
- Introduce employee to staff on first day Bring on tour of building/office/facilities including lunchroom, emergency exits, and restrooms
- Indicate location of parking lot / rapid transit station
- Provide keys (office, building, desk, file cabinets etc.)
- Provide security codes if necessary
- Show location of fax machines, copiers, printers etc.; provide instruction and any access information
- Review dress code and office protocol
- Explain completion of timesheet
- Review pay schedule
- Confirm work schedule

### Relevant Work Related Items

- Business cards
- Nameplates
- Name badge
- Pay card
- Cell phone
- PDA
- Laptop
- Uniforms
- Manuals/handbooks
- Tools
- Other \_\_\_\_\_

## Onboarding check list sample #2:

### Pre-Arrival

	<b>Task:</b>	<b>Who Initiates:</b>
	Confirm offer letter sent to new employee	Human Resources or Hiring Manager
	Call or email to officially welcome the new employee after confirmation of acceptance	Hiring Manager
	Provide new employee with a contact in the event of a question or issue	Hiring Manager
	Create an onboarding schedule for new employee	Hiring Manager
	Assign onboarding peer* for new employee's first two months on the job	Hiring Manager
	Schedule new employee to attend New Employee Orientation	Hiring Manager
	Contact Marketing office to order business cards, if applicable	Hiring Manager
	Contact Administrative Services to order name plate	Hiring Manager
	Order an ID for the new employee up to 30 days before the date of hire:	Hiring Manager
	Contact Administrative Services and Information Technology to set up computer, phone, log in password, and order office supplies	Hiring Manager
	Send an announcement via email to the applicable Law School community announcing the new hire and start date (sample email template on Company Intranet)	Hiring Manager
	Contact Payroll Department to set up new hire	Hiring Manager

### Arrival

#### 1st Day

	<b>Tasks</b>	<b>Who Initiates</b>
	Go to HR office (Evanston – 720 University Place; Chicago – Abbott Hall) to complete W-4, I-9, and Personal Data Form, sign Employment Application, and receive Staff Handbook and benefits packet	Employee
	Remind new employee to complete the online benefits enrollment within the first 31 days of employment (Must have ID and password)	Hiring Manager
	Contact Administrative Services regarding parking options	Employee
	Introduce to co-workers	Hiring Manager

	Distribute assigned key and/or access card to office	Hiring Manager
	Discuss procedures for scheduling time off and unexpected absences	Hiring Manager
	Review work schedule, pay schedule and overtime policy (if applicable)	Hiring Manager
	Review appropriate attire for workplace	Hiring Manager
	Go over phones, fax, copier, office supplies	Peer
	Provide Computer Orientation at desk	Peer
	Give a department tour (place to hang coat, washroom, water fountain, vending machine, pantry/kitchen, refrigerator, emergency exit, parking space)	Peer
	Arrange a welcome lunch for new employee	Hiring Manager and / or Peer
	<b>Within 1st Week</b>	
	Activate ID online if you have not done so	Employee
	Sign up for direct deposit and update online directory	Employee
	Review job responsibilities, competencies, and expectations	Hiring Manager
	Review performance feedback and appraisal process	Hiring Manager
	Review department's mission, strategy, values, functions, policies and procedures; organization of the department; critical members of the department; departmental staff directory, department calendar, confidentiality of information; emergency regulations, health and safety training	Hiring Manager
	Review Standards for Business Conduct (nondiscrimination, no smoking, drug and alcohol, no tolerance of workplace violence, sexual harassment prevention and resolution)	Hiring Manager
	Electronic Time Entry System (ETES) computer-based training (CBT) (for biweekly staff and temporary employees only).	Employee
	Other workshops and trainings	Employee
	<b>Within 2 Weeks</b>	
	Attend New Employee Orientation, Part 1: Benefits, work schedule and payroll	Employee
	Schedule new employee to attend New Employee Orientation, Part 2 two to three months into employment	Hiring Manager
	Schedule weekly or monthly meeting to touch base with supervisor	Employee
	Overview of budget and finance procedures and policies (if applicable)	Hiring Manager
	Accounting and Reporting Processes, Effective Business Operations (as applicable).	Hiring Manager

#### Within 1st Month

	Task:	Who Initiates:
	Enroll for benefits via electronic within 31 days of hire date	Employee
	Review and clarify performance objectives and expectations after the first month	Hiring Manager
	Set up brief meeting with department's head	Hiring Manager
	Register for New Employee Orientation, Part 2	Employee

#### During First 90 Days

	Task:	Who Initiates:

	Attend New Employee Orientation, Part 2:	Employee
	Meet fellow new employees.	Employee
	Review and discuss the staff member's performance objectives	Hiring Manager

**5th and 6th Month**

	<b>Task:</b>	<b>Who Initiates:</b>
	Review performance objectives and progress	Hiring Manager
	Discuss training completed and training planned for the future	Hiring Manager

**Annual Performance Review**

	<b>Task:</b>	<b>Who Initiates:</b>
	Conduct annual performance review	Hiring Manager
	Set objectives for the coming year with employee	Hiring Manager
		Hiring Manager

Once complete, this checklist should be signed by both the staff member and the supervising staff member. A copy should be provided to the staff member with the original filed in the department staff member's file. Please contact your human resources consultant with any questions.

Staff Member's Name (Please Print) \_\_\_\_\_

Job Title \_\_\_\_\_ Hire Date \_\_\_\_\_

Staff Member's Signature \_\_\_\_\_ Date \_\_\_\_\_

Supervising Staff or Faculty Member Signature \_\_\_\_\_

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