

# Onboarding New Employees

## A Manager's Checklist

Successful onboarding of new employees requires a well-executed plan that starts prior to the employee arriving for their first day of work. Collaboration and coordination among departments and individuals who will be interacting with the new employee is critical to present an organized and welcoming experience.

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### Goals

- Create a warm, welcoming, and organized onboarding process
- Provide tools, information, resources, and training for the new employee to be successful
- Stay connected and offer support, encouragement, and feedback – The new employee's role is important for the team and organization!

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### Before the First Day

- Communicate the employee's start date and time and who their contact person will be when they arrive (Send an email reminder to the contact person)
- Provide parking information and directions (as needed)
- Review dress expectations and how they will receive company clothing (if provided)
- Discuss food options while working (provide notification if food is provided the first day)
- Provide an email link for onboarding information that is required prior to arrival
- Remind them of any paperwork needed on their first day (e.g., licensure number, social security card, driver's license)
- Provide work schedule for their first week
- Secure computer access for the new employee based on their job role
- Confirm building access cards, name tags, parking permits, etc., with appropriate departments

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### The First Day/First Week

- First Day Orientation
  - Provide a Human Resources Welcome Packet that includes
    - A welcome message from the administrator/executive director
    - The agenda for orientation
    - Names of leaders and managers

- Orientation checklist
- Key policies and documents needed to complete orientation
- Login information and credentials for online learning
- Their favorite snack (that you confirmed during the interview process)
- Company shirt if provided
- Have a Welcome Packet for the Department that includes
  - Department/unit organizational chart
  - Job description
  - Department-specific orientation/onboarding checklist and timeline
  - Mentor(s) assigned for onboarding
  - A handwritten welcome note from you, their manager
- Have a plan to introduce the new employee – (e.g., email introduction, welcome bulletin board, staff member assigned on each shift to introduce the new person)
- Have lunch with the new employee – get to know them, find out what they like to talk about (after lunch, write down a few notes so you can ask them about something they are interested in at a later time – e.g., pet, hobby, sports)
- Introduce the new employee to key people in other departments
- Share how best to communicate with you and frequency – email, text, open door policy
- Check-in with the new employee at regular intervals (note reminders on your calendar)
  - First day
  - Second day
  - End of first week
  - End of second week
  - End of first month
- Assign designated mentors on each shift during the onboarding process (note designated mentors should be assigned based on their skills and ability to support new employees)
- Provide directions for designated mentors on how you would like to receive feedback from them (this can be part of the onboarding checklist)
- After the first week, determine if the orientation/onboarding timeline is accurate and adjust as needed

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### During and at the Completion of the Onboarding Process

- Make a point to connect with new employees on all three shifts.
- Obtain feedback from supervisors on the employee's performance. Provide regular employee feedback and coaching. Support their success.
- Mutually agree on competency with the employee. Determine if there are skills that the employee would like additional information or training on to feel competent.
- Submit a dated and signed employee onboarding checklist to Human Resources for placement in the employee's file.

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## If the Onboarding Process is Not Completed

- If the employee terminates employment prior to completing the onboarding process, conduct an exit interview to understand contributing factors
- If an exit interview is not able to be completed, conduct a debrief with supervisors to understand contributing factors

Notes:

The following resources were referenced in creating this document –

- Managers Onboarding Checklist. [Managers Onboarding Checklist | Human Resources \(sfsu.edu\)](#) [Accessed October 26, 2023]
- Manager's Checklist for New Employees. [Manager's Checklist for New Employees – Gallaudet University](#) [Accessed October 26, 2023]



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