

# Company Name

## New Hire Checklist

New Hire's Name:			
Start Date:			
Title		Department	
Mentor/Buddy			
Designated Office Area:			

### Pre-Start Date. Confirm that the items below have been completed

- |   |  |                          |
|---|--|--------------------------|
| <input type="checkbox"/> References Complete      | <input type="checkbox"/> Offer Letter accepted   | <input type="checkbox"/> |
| <input type="checkbox"/> Drug Test Scheduled      | <input type="checkbox"/> Welcome Letter sent     | <input type="checkbox"/> |
| <input type="checkbox"/> Negative DT Result Rec'd | <input type="checkbox"/> Email Introduction Memo | <input type="checkbox"/> |
| <input type="checkbox"/> Offer Letter sent: _____ | <input type="checkbox"/>                         | <input type="checkbox"/> |

**LIST ALL YOUR NEW HIRE REQUIREMENTS TO ENSURE THAT THEY ARE**

### Information Systems, Check off services which need to be arranged prior to start date

- Set up computer workstation
- Assign Local Printer
- Add initials to Service Coordinator Menu
- Set-up new hire's personal folder in G:\Docs
- Assign Local Printer
- Set up e-mail account
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_

**WHAT COMPUTER RELATED TASKS HAVE TO BE COMPLETED PRIOR TO THE NEW ASSOCIATE'S START**

### Install the following software on workstation:

- |   |                          |                          |
|---|--------------------------|--------------------------|
| <input type="checkbox"/> MS Word, Excel & Outlook | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> Policies NOW             | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> Performance NOW          | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/>                          | <input type="checkbox"/> | <input type="checkbox"/> |

### Add new hire to the following E-MAIL distribution lists:

- |                          |                          |                          |
|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**LIST ALL SOFTWARE CHOICES ABOVE AND E-MAIL DISTRIBUTION LIST HERE.**

Requested On	Date
Requested From	Name
Completed On	Date
Completed By	Name

**Office Set Up**, Check off all items which need to be arranged/installed prior to start date

Notify Receptionist		Notify Safety Dept.		Notify Technology/HRIS	
<input checked="" type="checkbox"/>	Phone Extension	<input type="checkbox"/>	Office Key	<input type="checkbox"/>	Cellular Phone Order
<input checked="" type="checkbox"/>	Add Name to In/out Board	<input type="checkbox"/>	Security Code	<input type="checkbox"/>	Temporary Business Cards
<input checked="" type="checkbox"/>	Office Supplies	LIST ALL THE MISCELLANEOUS ITEMS		<input type="checkbox"/>	Business Cards
Notified:	(Name)	Notified:	(Name)	Notified:	(Name)
Completed	(Date)	Completed	(Date)	Completed	(Date)
Notify Orientation Committee		Other: _____		Other: _____	
<input checked="" type="checkbox"/>	Welcome Binder	<input type="checkbox"/>		<input type="checkbox"/>	
<input type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
Notified:	(Name)	Notified:	(Name)	Notified:	(Name)
Completed	(Date)	Completed	(Date)	Completed	(Date)

**Scheduling of Orientation Meetings**, Check off as scheduled & confirmed

<input type="checkbox"/>	Date:	Time:
<input type="checkbox"/>	Date:	Time:
LIST ALL DEPARTMENT AND MANAGERS THE NEW ASSOCIATE SHOULD MEET WITH DURING THEIR ORIENTATION.		Time:
<input type="checkbox"/>	Date:	Time:
<input type="checkbox"/>	Date:	Time:
<input type="checkbox"/>	Date:	Time:
<input type="checkbox"/>	Date:	Time:
<input type="checkbox"/>	Date:	Time:
<input type="checkbox"/>	Date:	Time:

**Site Visits**, Check off as scheduled & confirmed

<input type="checkbox"/>	Sales Visit	Date:	Time:
ARE THERE ANY CUSTOMER SITES, REMOTE OFFICES, OR SIMILAR LOCATIONS WHICH THE NEW HIRE SHOULD VISIT AS PART OF THE			
<input type="checkbox"/>	Date:	Time:	

**Job Training Goals**

1st Month Training Goals	2nd Month Training Goals	3rd Month Training Goals
1	1	1
LIST THE NEW HIRE'S GOALS FOR THE 1ST THREE MONTHS OF EMPLOYMENT.		2
3	3	3
4	4	4

# NEW HIRE ORIENTATION AND TRAINING PROGRAM

## POST OFFER, PRE-START DATE

By using the New Hire Checklist Form, ensure that all items listed below are completed prior to start date:

- ✓ Send Post Offer Letter to new hire which covers (located at \_\_\_\_\_):
  - Basic information on orientation schedule
  - Invitation to lunch on first day
  - Who to see on first day
  - Dress code
  - Name of mentor
  - First day start time of 9am
  - Enclose the mentor's business card with the letter
- ✓ Ensure that the receptionist is notified of new hire's start date by providing a copy of the above letter. Receptionist is responsible for adding the new hire's name to the In/Out Board, ordering/organizing basic office supplies and adding the new hire's name to the switchboard.
- ✓ Send an e-mail announcement, to all (company)\_\_\_\_\_ employees, which provides the new hire's name, title, start date and brief work history.
- ✓ Ensure that office area is selected and set up, including a telephone and a computer.
- ✓ Ensure that the employee is added to all the appropriate email distribution lists and has access to the appropriate software.
- ✓ Schedule all department meetings and site visits.
- ✓ Ensure that the safety department has been notified of the need for a key card and password.
- ✓ Ensure that \_\_\_\_\_ is notified of the need for business cards and/or a cellular phone
- ✓ Ensure that the Orientation Committee is notified of the need for a copy of the (company)\_\_\_\_\_ Binder. Leave copy of (company)\_\_\_\_\_ Binder in new hire's office area

Contents of Binder include:

- |  |                                     |
|--|-------------------------------------|
| • Welcome Letter   | • Common Terminology                |
| • Binder Index   | • Internal Services                 |
| • Mission Statement  | • Organizational Chart              |
| • Company History  | • Phone and Voice Mail Instructions |
| • Computer Set up and<br>Frequently Used<br>Computer Files Listing | • Map of Local Area                 |
| • Confidential Phone List  | • Map of Office                     |
| • Emergency Action Plan  | • Closing Page                      |
| • Recycling Program  | • New Hire Paperwork                |
|  | • Miscellaneous Brochures           |

# NEW HIRE ORIENTATION AND TRAINING PROGRAM

## NEW HIRE SCHEDULE

The Scheduling Of Meetings Is The Responsibility Of The Hiring Manager, or Their Designate.

### DAY ONE:

- 9am Arrive at (company)\_\_\_\_\_
- 9am Meet with department manager to:
- Introduction to (company)\_\_\_\_\_ ,
  - Review (company)\_\_\_\_\_ binder,
  - Discuss department's function,
  - Provide overview of first day schedule,
  - See item #1 on the Standardized Departmental Training Program Outline for a complete list of topics.
- 9:30/10am Department manager introduces and turns over new hire to mentor. Mentor to:
- Review of department/job specific topics. See item #2 on the Standardized Departmental Training Program Outline for a complete list of topics.
  - Tour office
  - Make brief introductions
- 10:30/11am BREAK
- 11:00am Mentor to review job responsibilities with new hire
- Noon LUNCH with department manager, mentor and no more than one other department associate
- 1:30pm BREAK
- 1:45/2pm Meet with New Client Services for department overview and processing of new hire paperwork and benefits
- 2:30/3pm Meet with \_\_\_\_\_
- 3/3:30pm Meet with \_\_\_\_\_
- 3:30/4pm Meet with \_\_\_\_\_

Upon completion of meetings, the new hire will meet with their mentor to discuss any questions from them day and continue job training.

**Do not let new hire sit with nothing to do, or review. If it becomes apparent that there is not enough time to dedicate to the new hire for the balance of the day, then the New Hire is excused to go home for day - upon department manager approval.**

### DAY TWO, morning:

- 9am Arrive at (company)\_\_\_\_\_
- 9am Meet with mentor to:
- Review previous day, if needed
  - Provide overview of second day schedule
- Balance of Day: See Day Two through Five.

# NEW HIRE ORIENTATION AND TRAINING PROGRAM

## DAY TWO through DAY FIVE

The following list should be scheduled and accomplished during the new hire's first week of employment.

- Job Training
- Employee and mentor meet with Safety Department to:
  - Review building security
  - Review emergency plans
  - Issue door key and security code
- Employee and mentor meet with Benefits Department to:  
Review their department functions  
Review benefit plans
- Watch Sexual/Illegal Harassment and Diversity Video
- Employee and Mentor meet with two or three of the following Departments, per day, in between job training:

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# Standardized Departmental Training Program Outline

1. **Department Manager's Review During Day One Of Orientation Process:**
  - a. Introduction to (Client)\_\_\_\_\_
  - b. The department's role within (Client)\_\_\_\_\_
  - c. Department structure
  - d. Department functions
  - e. Department function within (Client)\_\_\_\_\_
  - f. Review of (Client)\_\_\_\_\_ Welcome Binder
  - g. Overview of Orientation Schedule
  - h. Overview of Training Program
  
2. **Mentor's Review Of Job Responsibilities During Day One Of Orientation Process:**
  - a. Job description
  - b. Review of job specific training outline (this document).
  - c. Mentor's review of Job Specific Training Program.
  - d. Mentor and employee review the 90-day training goals.
  
3. **On-The-Job Training**
  - a. Using the Job Specific Training Program, the mentor and employee begin the training process
  
4. **Monthly Meeting With Mentor (1<sup>st</sup> three months only)**
  - a. Review of monthly goals in comparison of training accomplished
  
5. **90-day Performance Evaluation With Department Manager**
  - a. Upon completion of the orientation period, the employee will be formally reviewed on the following criteria:
    - Monthly Goals
    - Job Performance
    - Attendance
    - Compatibility with Job

*End of Formal Training Program*