**New employee checklist**

**Name of New Employee:**

**Role:**

**Department / Function:**

**Manager:**

**Planned Start Date:**

| **Practical Stuff** | **Who will do it?** | **Date to be completed** | **Completed** |
| --- | --- | --- | --- |
| *Offer letter and or welcome email with starting day info* | HR | Within 24 hours of verbal offer acceptance. |  |
| *Paylocity, Onboarding message sent* | HR | Collect all their personal info and print out I-9 for orientation |  |
| *Paylocity, payroll info and identification* | HR | Before start date |  |
| *Seat / space to be allocated*  *Desk, Chair or work bench* | Department manager | On acceptance of role |  |
| *Office supplies* | Manager | Ready before start date |  |
| *Internal Telephone – which extension will be allocated*  *Telephone list updated* | IT Dept | Completed before start date |  |
| *IT equipment - Computer, mouse, keyboard, screen, cables etc.  Software needs*  *Printer connection*  *Email account set up*  *Server – user rights access* | Dept Manager notifies IT Manager of employees needs via helpdesk ticket | Ready to go for day one |  |
| *Desktop to be set up* | IT |  |  |
| *Business Cards – Yes / No* | Marketing |  |  |
| *Assign a buddy – give them the heads up on requirements* | Dept Manager | Before start date and induction planning |  |
| *Handover with previous job holder needed?* | Dept. Manager to action | Before start date if incumbent is leaving and induction planning |  |
| *Planning of Onboarding – timings / content / scheduling* | Dept. Manager, Buddy, IT & HR | Completed latest one week before start date to allow diary times to work |  |
| *Make individual aware of arrangements on first day* | Dept. Manager | Week before start date |  |
| Communication to be sent prior to start date (could include)   * *Punchbowl card (HR)* * *First Day - HR Welcome email with all the details (who to meet, when / where) what to wear, where to park, etc.* | Nice touch to have your team sign welcome card and place on their desk or bench. Join employee for lunch after orientation |  |  |
| Team Intro   * Update HRIS pic, profile | HR | Within first week |  |
| Briefing on end of week presentation - nice to do to see what your new member of the team has learned | Dept.Manager |  |  |

### Some assets you may want to create as an use info guide for your new starter

* Tools they will use: A document with links / logins / guides
* Local area fact sheet: Coffee/cafe options, lunch tips, local gym/classes, nearest park, etc.
* Social profiles: Facebook, Instagram, YouTube
* Fact sheet or glossary: Industry/company terminology
* Slack channels: Which channels to join to make them feel welcome and so they don’t miss company updates, etc.
* Company timeline and history - always makes for a nice story
* Welcome letter from CEO or another executive – a video message can be powerful
* SWAG where applicable
* Benefits: How to access, manage, etc.
* Mental health signposting sheet and supporting documents / services
* Do and don'ts: How we do things around here
* Fob and building access/security codes, etc.
* Info about Workout room/ parking / where to clock in, etc.
* Team or culture activities invites / social calendar