

hrcouncil.ca **Orienting a New Employee Checklist**

Employee name	
Position	
Start date	

Prior to start

- Advise Board members and staff of the new employee's name, position, and start date
- Arrange for a workspace
- Equip the workplace with the necessary furniture, equipment and supplies
- Ensure that all equipment is working
- Set up an e-mail address
- Set-up a telephone extension
- Add the employee to organizational lists – telephone, e-mail
- Make a copy of the job description
- Gather information, reports, etc to give the person on the first day
- Ensure the staff handbook is up-to-date
- If the employee will need a key to access the office, arrange to have it ready for the first day
- Contact the new employee to confirm where and when they should report on the first day
- Set up the orientation team – who will be doing what for the orientation
- Decide what meaningful tasks the new employee will start on and prepare the necessary background material

First day

- Keep your schedule as free as possible for the first day

Getting Started

- Welcome the new employee
- Outline the orientation process for the day
- Introduce the new employee to his/her coworkers
- Introduce the new employee to his/her 'buddy'
- Give the employee a tour of the assigned workspace and the rest of the office/facility including:
 - Where to safely put belonging (if not in their office)
 - Where to hang coat, store lunch; location of the washrooms
 - Location of the photocopier, fax machine, and supplies, etc.

Organizational Overview

- Overview of the organization
- Organization Chart

Job Duties and Responsibilities

- Review the employee's job description and expected outcomes

Provided for reference only.

Always consult current legislation in your jurisdiction to create policies and procedures for your organization.

- Explain how the job is related to the other jobs in the organization
- Give specific outcomes for the first day such as a look at the organization's website, review of a specific document, etc.
- Identify the work that needs to be accomplished in the first week
- Give the employee reports, information that is need for the job and explain what each item is

Work expectation

- Start and finish times
- Lunch time
- Probationary period
- Safety procedures, as appropriate

Administration

- Complete the necessary paperwork for pay and benefits
- Complete other paperwork as required
- Identify options for parking
- Provide password for equipment as appropriate

Other

- Review health and safety procedures
- Allow for time for the new employee to set up their workspace, review the materials you have given, etc.
- Take the employee out to lunch
- Have a task planned for the first day

First two weeks

- Check to see if there are any problems with equipment or the workspace
- Ensure that the employee has met all the other staff members
- Review the performance management system
- Order business cards, if appropriate
- Tour other sites of the organization, if applicable
- Explain the internal communication process including staff meetings
- Have the employee review the policies and procedures manual
- Explain how absences are called in and covered, telephone and e-mail protocol, internet use policy
- Explain the travel and reimbursement process
- Ask if the new employee has any question or if there is anything that needs to be addressed
- Confirm that the employee understand what is expected – duties and responsibilities
- Review all fire and safety procedures

First six months

- Review probation procedures
- Schedule regular meetings with the new employee to ensure that they are on track
- Establish performance expectations

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A national organization agreed to post this policy on www.hrcouncil.ca as part of the HR Toolkit. Sample policies are provided for reference only. Always consult current legislation in your jurisdiction to create policies and procedures for your organization

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