

Customizable Manager Checklist — Onboarding Process

The recommended orientation process is outlined below. Some items may not apply to the company or particular departments, so feel free to add, delete or change this list as needed.

Managers should use this checklist to ensure the new hire is provided a thorough and comprehensive onboarding experience. The immediate supervisor can delegate some of these tasks to an administrative coordinator but should have overall ownership of the new hire's training and development experiences.

PRIOR TO THE FIRST DAY

Check	Action
<input type="checkbox"/>	<p>Internal Human Resources creates new employee personnel file.</p> <p>A customizable Employee File Checklist is available via your TriNet Consultant to assist you in this process.</p> <p>Upon acceptance of the employment offer, complete and submit the online Add New Hire/Rehire Form found on <i>TriNet Passport > My Workplace > Add New Hire/Rehire</i>. This will upload the employee data into TriNet Passport and generate the TriNet Welcome Email that will be automatically delivered to the employee's work email address on their date of hire.</p> <p>Give this New Employee Personal Information Form to the employee to gather the necessary data for entry into TriNet Passport as a new hire. This form is provided for you in this toolkit, and can also be found at: <i>TriNet Passport > Myself > Forms – All Forms > Employee: "New Employee Personal Information and Conditions of Employment Statement"</i></p>
<input type="checkbox"/>	<p>Send personalized Welcome/Introduction Letter (or email) to the new hire <i>prior</i> to their first day of work.</p> <p>Welcoming a new employee is more than making a company announcement and a boss assignment. Welcoming a new employee, to give the new employee the best possibility of integrating successfully in your company, requires a series of steps that start after your job offer is accepted.</p> <p>Your TriNet Consultant can provide you with a New Employee Introduction/Welcome Letter Template which you can use to welcome and introduce the new employee to your company and provide an overview of next steps.</p>
<input type="checkbox"/>	<p>Call the new employee to schedule details for the first day of work.</p> <ul style="list-style-type: none"> • Provide reporting time • Remind employee of any important information or requirements for first day (example: bring I-9 identification, proper dress code, etc.) • Provide directions and parking information (if applicable) • Provide name of contact person for whom new hire should ask upon arrival
<input type="checkbox"/>	<p>Set up work space.</p> <ul style="list-style-type: none"> • Desk, telephone, nameplate, access card, business cards, email, etc. • Ask if the employee has any additional ergonomics needs (keyboard, chair, etc.)
<input type="checkbox"/>	<p>Assign office equipment and have new hire sign the Company Property/Equipment Form.</p> <ul style="list-style-type: none"> • TriNet has created this form for your use to keep track of desktop, laptop, mobile phone, office phone line, PDA, access badge/keys, etc. It can be obtained from your TriNet Consultant.

PRIOR TO THE FIRST DAY (CONTINUED)

Check	Action
<input type="checkbox"/>	<p>Send an organizational announcement email company-wide or within the assigned department informing staff that the new employee is joining the team as of their designated hire date.</p> <ul style="list-style-type: none"> • Provide a brief description of the individual's background and bio • Describe the role the individual will fill at the company and/or whether they are replacing a former employee • Be sure to include the new employee on this communication
<input type="checkbox"/>	<p>Prepare work unit.</p> <ul style="list-style-type: none"> • Assign "buddy" or mentor to help assimilate new hire to the organization • Identify meaningful work for new hire to do during first week • Prepare a "1st Week Agenda" including Benefits and TriNet Passport Orientation attendance • Employee will receive a welcome email from TriNet with instructions for completing their online payroll and benefits forms, including reference to the online "New Hire Orientation" tutorials (located on <i>TriNet Passport > Resources (bottom of page) > New Hire Orientation</i>) which contains five (5) audio/visual modules: <ol style="list-style-type: none"> 1. TriNet Employee Orientation 2. TriNet Passport Tutorial 3. Health Benefits Tutorial 4. Managing Your Pay Tutorial 5. Your Responsibilities Tutorial (Handbook/Policies)
<input type="checkbox"/>	<p>Gather reference materials to give to new hire.</p> <ul style="list-style-type: none"> • Organization Chart • Marketing materials or collateral • Employee Handbook (online), additional policies online and/or procedure manuals • Company directory/phone list and "who is who," departmental structure • "Seven Steps in TriNetPassport.com," a new hire online platform navigation guide which can be obtained via your TriNet Consultant

FIRST AND SECOND DAY

Check	Action
<input type="checkbox"/>	<p>Welcome new hire</p> <ul style="list-style-type: none"> • Introduction to work group • Tour of office, kitchen, restrooms, copiers, mail room, emergency exits, etc. • Meeting with key people during on-boarding process (manager, admin support, buddy/mentor, etc.) • Review “1st Week Agenda” so new hire knows what to expect during the first days. A New Hire Weekly Planner template is available via your TriNet Consultant. • Review New Employee Checklist with new hire. Ask your TriNet Consultant for a customizable sample employee checklist.
<input type="checkbox"/>	<p>Complete new hire paperwork</p> <ul style="list-style-type: none"> • I-9 form completed online and documents verified • Have new hire review and sign Confidentiality or Proprietary Information Agreements, if applicable • Explain TriNet co-employment relationship, provide contact information for Solution Center, and quick “tour” of TriNet Passport including the Employee Handbook and posted company policies (if applicable) • Set a date for employee to attend New Employee Orientation online • Review onboarding schedule and timeline
<input type="checkbox"/>	<p>Review administrative business</p> <ul style="list-style-type: none"> • Payroll schedule (go to <i>TriNet Passport</i>><i>My Company</i> > <i>Payroll</i>) • Procedures for reporting work time (if applicable) • Computer systems and logins • Security processes, ID badges, etc. • Procedures for mail (incoming/outgoing), shipping • Procedures for placing supply orders • Ordering business cards • Travel requirements • Procedures for completing expense reports • Procedures for requesting time off, how/when to report sick time usage, etc. • Review important policies or practices – anti-harassment, dress code, whistleblowing, ethics, electronic communication, confidential information, etc. • Holiday calendar and time off request

DURING THE FIRST WEEK

Check	Action
<input type="checkbox"/>	<p>Confirm that new hire has participated in online New Employee Orientation (available in TriNet Passport); if not, remind new hire to log on to TriNet Passport to complete W4 and direct deposit form.</p>
<input type="checkbox"/>	<p>Introduction to organization and work group</p> <ul style="list-style-type: none"> • History and mission • Product/service offering • Organization chart • New hire's role and fit within organization • Key clients, vendors, outside contacts • Important internal and external resources • Review of upcoming company events and activities
<input type="checkbox"/>	<p>Performance expectations and measurement</p> <ul style="list-style-type: none"> • Job description and position expectations • Initial review period and performance management schedule • Goals and objectives of the organization • Goals and objectives of the employee • Training and development opportunities
<input type="checkbox"/>	<p>Compensation topics</p> <ul style="list-style-type: none"> • Annual pay review/merit increase timeframes • Compensation philosophy • Overtime policies (applicable for non-exempt employees only) • Performance bonus or variable compensation (if applicable)
<input type="checkbox"/>	<p>Suggested assimilation activities</p> <ul style="list-style-type: none"> • Work unit welcome lunch • One-on-one meeting with member(s) of executive team • Rotation through different work units

REMINDERS TO THE MANAGER FOR THE FIRST WEEK

Check	Action
<input type="checkbox"/>	Check in often with the new employee – don't wait for a new employee to come to you.
<input type="checkbox"/>	Begin inviting the new employee to key meetings.
<input type="checkbox"/>	Create opportunities for the employee to interact with others employees and understand the company culture.
<input type="checkbox"/>	Encourage other colleagues to invite the new employee to partake in campus activities.
<input type="checkbox"/>	If the new hire has direct reports, set up meetings with them and their support staff.
<input type="checkbox"/>	Schedule one-on-one meetings for the new hire to meet with departmental and other colleagues with whom he/she will work closely. These meetings can occur throughout the first month.
<input type="checkbox"/>	Invite the new employee to join you for lunch. Invite other team members and reinforce the message that the new employee's contributions will be appreciated.

END OF THE FIRST WEEK

Check	Action
Towards the end of the first week, meet with the new employee to discuss and reinforce the following:	
<input type="checkbox"/>	Feedback from the shadowing sessions with department colleague(s).
<input type="checkbox"/>	Your initial (informal) feedback on the new employee's performance to date. Tip: It's never too early to provide feedback. Until then, a new employee is uncertain of their actions.
<input type="checkbox"/>	The new employee's feedback on his or her direct reports (if applicable).
<input type="checkbox"/>	The department's staff meeting schedule (if applicable).
<input type="checkbox"/>	The process for the new employee to request time off.
<input type="checkbox"/>	The travel and expense reimbursement process (if applicable).
<input type="checkbox"/>	Foreseeable challenges the new employee may encounter and how to overcome them.
<input type="checkbox"/>	Your communication style — whether you prefer email versus phone, an open door versus scheduled meetings — and how your styles can work together.
<input type="checkbox"/>	Your approach to time management, and what the employee can do to make better use of his or her time.
<input type="checkbox"/>	The employee's schedule of activities for month one, including: <ul style="list-style-type: none"> • Applicable training dates • Job- and department-specific learning activities
<input type="checkbox"/>	Your schedule for the month and the best time and method to reach you.
<input type="checkbox"/>	Any additional questions the employee might have.

FIRST MONTH

The employee should now be ready to take on more responsibility. During the first month of employment, continue to reinforce key issues and introduce the new employee to additional staff, including key members of the leadership team. Check in to confirm that the employee's questions and concerns are being addressed. Sample new employee activities include meeting other departments to learn their functions, immersing them in the organizational culture and meeting with his/her supervisor and creating a development plan.

30-DAY CHECK-IN

Check	Action
Toward the end of the first month, meet with the new employee to discuss and reinforce the following. Check the box when complete.	
<input type="checkbox"/>	How you feel the employee is performing.
<input type="checkbox"/>	What is most important to you as far as your employee's work objectives?
<input type="checkbox"/>	The core elements of a performance evaluation: <ul style="list-style-type: none"> • The department's performance evaluation process and cycle, and the criteria and evaluation form that the company will use to evaluate the new employee's performance.
<input type="checkbox"/>	Rewards and recognition opportunities and how to apply.
<input type="checkbox"/>	The employee's career goals; create a development plan.
<input type="checkbox"/>	What the employee should do if he/she has a conflict with another employee.
<input type="checkbox"/>	Once the new employee has had the opportunity to integrate into the workplace, allow them to provide feedback or new ideas based on their first impressions of the organization.
<input type="checkbox"/>	The employee's schedule of activities for the future, including: <ul style="list-style-type: none"> • Applicable training dates • Job- and department-specific learning activities
<input type="checkbox"/>	Any additional questions the employee might have.

FIRST YEAR

The onboarding process should continue by providing a touchback to the new employee to ensure that all necessary information has been shared and that the organization addresses the employee's questions and concerns. Sample new employee activities include establishing 60- and 90-day performance reviews, establishing formal ongoing check-in meetings and attending any formal ongoing training. A 30-60-90-Day Performance Review Template is available via your TriNet Consultant.