

New Employee Orientation Checklist Template

HR Department:

- Mandatory forms
 - I-9 form
 - W-4 form
 - Employee contract
 - Employee acknowledgement and consent form
 - Background check form
 - Direct deposit form
- Policy Overview
 - Non-disclosure agreement
 - Non-compete agreement
 - Confidentiality agreement
 - Employee handbook
- Procedural steps
 - Entering and leaving the building (a security pass or card)
 - Placing an order for stationery, IT department, etc.
 - Requesting time off (or sick leave)
- Company benefits
 - Health and life insurance
 - Mobile phone plan
 - Company car policy
 - Stock options guide
 - Performance bonus guide
 - Employee wellness program
- Employee uniform (if there is one)
 - Dress code policy

IT Department:

- Someone from IT needs to help the new hire(s) with their computer setup.
 - They should understand how to use the company tools and software needed for their role.
- Schedule an in-depth training session on IT security guidelines.
- Schedule a product demo if at all relevant.

- Explain how to use the office equipment, such as
 - Telephone (internal and external calls)
 - Printer
 - Fax
 - Kitchen appliances (like the coffee machine)
 - Video conferencing tools

One-on-One with the Manager:

- Discuss the everyday routine
 - Regular work times
 - Breaks
 - Lunch options
- Job duty and responsibilities
- Take them on an office tour
 - Show the meeting rooms and explain how to book them
 - Show where the building's emergency exits are located
 - Show where they can find stationary
- If they need help, introduce them to the relevant employee(s)
 - Their direct manager
 - The HR team
 - The IT team
 - The office manager
- Schedule meetings with colleagues and team leaders from other departments for in an-depth breakdown of how they'll work together
- Schedule an office gathering to welcome the new hire(s), try a group lunch or after-hours drinks
- Assign a mentor to help the new hire(s) with onboarding and questions for the first six months