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.

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- 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

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