



NEW EMPLOYEE ORIENTATION CHECKLIST GENERAL CHECKLIST

Employee name: _____

Position: _____

Start date: _____

PRIOR TO START

- ☐ Advise department of the new employee's name, position, and start date
- ☐ Arrange for a workspace
- ☐ Equip the workspace with the necessary furniture, supplies and equipment including computer, phone and other technology needed
- ☐ Ensure all equipment is working
- ☐ Confirm an e-mail address has been set up and request access to department share drives, shared mailboxes, and distribution lists
- ☐ Set-up a telephone extension
- ☐ Assign a mail drop location with Facilities
- ☐ Add the employee to organizational lists – telephone, email, website
- ☐ Gather pertinent information, reports, etc. to give the person on the first day
- ☐ Ensure the area handbook or reference information is up-to-date, if applicable
- ☐ If the employee will need a key or programmed fob to access the office, arrange to have it ready for pick-up on the first day
- ☐ Contact the new employee to confirm where and when they should report on their 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

- ☐ Ensure you are accessible to the employee on their first day
- ☐ Suggest the area get together to take the employee out to lunch or coffee, or plan something to ensure they feel comfortable and welcomed

GETTING STARTED

- ☐ Welcome the new employee
- ☐ Outline the orientation process for the day
- ☐ Introduce the new employee to coworkers
- ☐ Confirm where the new employee should go to for questions or assistance
- ☐ Inform the new employee of the process to get employee photo ID
- ☐ Show employee how to access InVIU to register for on-campus development opportunities
- ☐ 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, lunch/break room
 - Location of the photocopier, fax machine, and office supplies, etc.

ORGANIZATIONAL OVERVIEW – MANAGER’S RESPONSIBILITY

- ☐ Overview of the organization, in general
- ☐ Organization Chart for institution and area/department
- ☐ Explain how the job is related to the others in the organization

JOB DUTIES AND RESPONSIBILITIES – MANAGER’S RESPONSIBILITY

- ☐ Review the employee’s job description and expected outcomes
- ☐ Give specific outcomes for the first day such as a look at the organization’s website, review of a specific document, etc.
- ☐ Identify work that needs to be accomplished in the first week
- ☐ Give the employee reference material and information that is needed for the job

WORK EXPECTATION – MANAGER’S RESPONSIBILITY

- ☐ Start and finish times
- ☐ Lunch and break times, if appropriate
- ☐ Probationary period process
- ☐ Review health and safety procedures, including evacuation points
- ☐ Discuss training required for role

ADMINISTRATION

- ☐ Ensure the necessary paperwork for pay and benefits has been completed
- ☐ Identify options for parking, including where to go to purchase a parking pass
- ☐ Provide passcodes for equipment as appropriate

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
- ☐ Order business cards, nametag if appropriate and door name plate, if necessary
- ☐ Tour other sites of the area or campus

- ☐ Explain the internal communication process, including staff meetings
- ☐ Have the employee review the policies website, highlighting the pertinent policies or guidelines
- ☐ Explain how absences are called in and covered, telephone and email protocol
- ☐ Explain the travel and reimbursement process
- ☐ Ask if the new employee has any question or if there is anything that needs to be addressed

FIRST SIX MONTHS – MANAGER’S RESPONSIBILITY

- ☐ Review probation procedures and fill out any required paperwork, talk to HR if there are any questions
- ☐ Have regular meetings scheduled between the employee and their supervisor to ensure that they are on track