



**whirks**  
HUMAN RESOURCES

## **New Employee Onboarding Checklist**

*Take the following steps to ensure smooth onboarding of all new employees.*

- o Schedule new hire orientation.
- o Set-up or order equipment and technology items (computer, phone, keys, etc.)

*Prepare the following new hire documents:*

- o Offer letter and job description.
- o Form I-9
- o Form W-4
- o Confidentiality agreement.
- o Emergency contact information.
- o Benefit enrollment forms.
- o Employee handbook.
- o Direct deposit form.
- o Organizational chart.
- o Phone list and office map.
- o Safety instructions.
- o Personnel action form.
- o State-required new hire pamphlets.
- o Other state or local documentation requirements.

- o Any other materials a new employee would find useful on the first day.

*Conduct new hire orientation/onboarding process with the following steps:*

- o Review and discuss new hire paperwork.
- o Schedule or conduct safety training.
- o Provide tour and introductions with manager.
- o Provide information on company logistics, including workstation location, break rooms, and rest rooms.
- o Provide instructions for phone and computer access.
- o Sign agreements for security access and keys.
- o Explain timekeeping requirements.
- o Explain organization structure (provide organization chart and job description).
- o Discuss company mission, vision, values, and goals.
- o Schedule time for the employee to read and sign the handbook.
- o Describe company products and services.
- o Describe benefits of working at the company (employee benefits, job opportunities, etc.).

*Upon completion, review new hire paperwork for completeness and accuracy.*

- o Create personnel and confidential file folders.
- o Process new hire paperwork as needed and update human resource information system.
- o Provide payroll with a copy of the employee's Form W-4, direct deposit information (if applicable), and other necessary information.

- o Work with benefit providers to enroll employee in elected benefits.
- o Schedule first day lunch with manager or co-workers, and assign an onboarding “buddy” to help the new employee get acquainted with the company.

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