# New Hire Checklist v1.0

This checklist is designed to help you get your new team member started successfully.

* Complete as many steps as possible before their first day of work.
* Check the boxes when the action is completed, or the work tool or resource received, not when a request for action, work tool, or resource has been submitted.
* Refer to this guide for full instructions on how to most effectively use this checklist.

| New Employee Information |
| --- |
| Name: | Position: |
| Start Date: | Manager: |

| Employment Contract | Sent ▢ Reviewed ▢ Signed ▢  |
| --- | --- |
| Comments: |
| Welcome Message | Sent ▢ Received ▢  |
| Comments:  |
| Welcome Package | Sent ▢ Received ▢  |
| * Personalized welcome card
* Company gifts (e.g. t-shirt, mug, pen)
* Employee handbook (physical or digital)
 | * Facility / office key card or fob
* Medical and health benefits booklet
* Required paperwork
 |
| Comments: |
| Orientation Program Email | Sent ▢ Received ▢ |
| * Start time and location
* Key contact names and emails
* Dress code information
 | * First week high-level agenda
* Team member names and org chart
* Key policies and processes
 |
| Comments: |
| New Hire Paperwork | Sent ▢ Received ▢ Completed ▢  |
| * Employee information form
* [Payroll / direct deposit](https://peoplemanagingpeople.com/topics/manage-payroll-for-small-business/) form
* Tax withholding form ([TD1](https://www.canada.ca/en/revenue-agency/services/tax/businesses/topics/payroll/payroll-deductions-contributions/income-tax/electronic-form-td1.html) or [W-4](https://www.irs.gov/pub/irs-pdf/fw4.pdf))
 | * Medical coverage form ([MSP](https://www2.gov.bc.ca/gov/content/health/health-forms/msp))
* Extended health form
* Group RRSP / 401(k) form
 |
| Comments: |

| Workstation |
| --- |
| * Office or cubicle
* Desk
* Chair
* Other \_\_\_\_\_\_\_\_\_\_\_\_\_
 | * Filing cabinet
* Office supplies
* Business cards
 |
| Comments: |
| Computer Equipment |
| * Laptop
* Desktop
* Tablet
* Other \_\_\_\_\_\_\_\_\_\_\_\_\_
 | * Dual-monitors
* Laptop docking station
* Mouse and keyboard
 |
| Comments: |
| Network Access |
| * Shared network drives
* Company intranet
* Email address
* Remote access
* Other \_\_\_\_\_\_\_\_\_\_\_\_\_
 | * Email lists (specify)

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Comments: |
| Software Licenses |
| * Office productivity (specify) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Project management (specify) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* R&D applications (specify) \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Other \_\_\_\_\_\_\_\_\_\_\_\_\_
 |
| Comments: |
| Office / Facility Access | Travel Resources |
| * Key card or fob
* Building alarm codes
* ID badge
* Other \_\_\_\_\_\_\_\_\_\_\_\_\_
 | * Business cards
* Product demonstration kits
* Company-branded clothing
* Other \_\_\_\_\_\_\_\_\_\_\_\_\_
 |
| Comments: |

| First Day Agenda |
| --- |
| [Insert agenda here - example below]

| Day 1 Agenda | Organizer | Completed |
| --- | --- | --- |
| One-on-one meeting with manager | Manager | ▢ |
| Review orientation program agenda | Manager | ▢ |
| Create trust agreement | Manager | ▢ |
| Meet team members | Manager | ▢ |
| Tour facility / office | Manager | ▢ |
| Review available work resources | Manager | ▢ |
| Review employee handbook / key policies | Human Resources | ▢ |

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| First Week Agenda |
| [Insert agenda here - Day 2 example below]

| Day 2 Agenda | Organizer | Completed |
| --- | --- | --- |
| One on one with manager | Manager | ▢ |
| Review / revise orientation program agenda | Manager | ▢ |
| Review employee handbook / key policies (cont’d) | Manager | ▢ |
| Meet team members | Manager | ▢ |
| Lunch with team members | Manager | ▢ |
| Complete new hire paperwork | Human Resources | ▢ |
| Company presentation from CEO / founder / exec | Human Resources | ▢ |
| Review available work resources (cont’d) | Manager | ▢ |

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