# 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 | ▢ | | |
| 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 | ▢ | | |