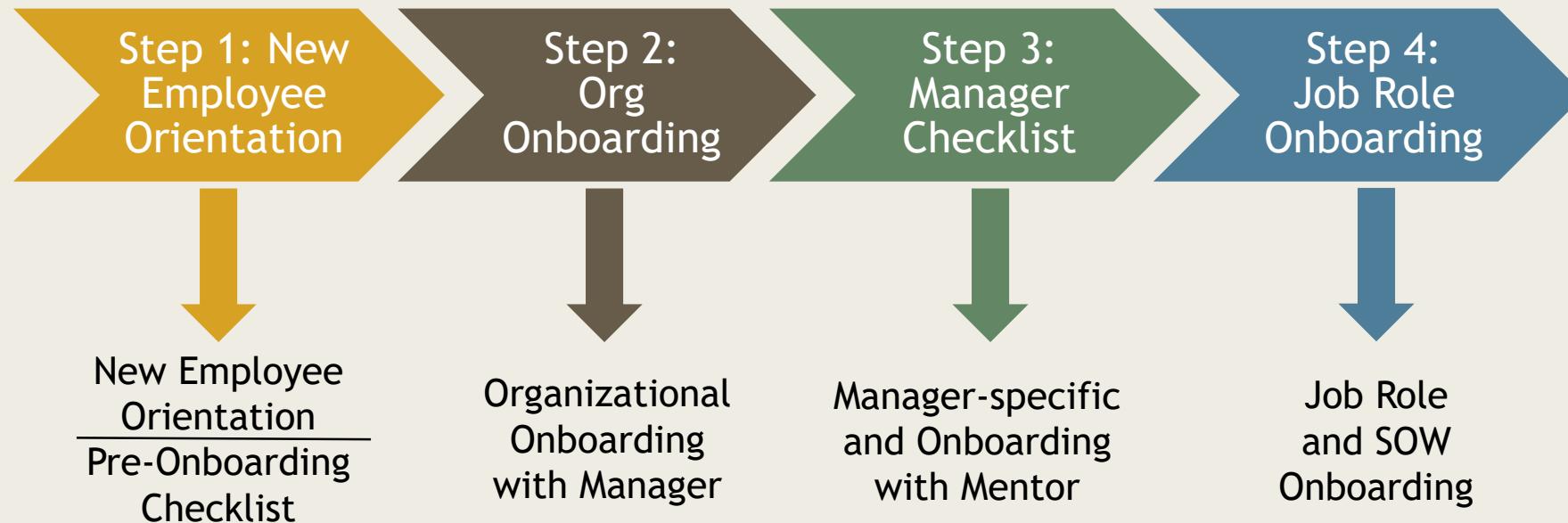


ONBOARDING

Onboarding Process and Checklists

Onboarding Process Flow



The Onboarding process is a 4-step process. This process starts after the orientation and applies to all employees joining the organization (new or transfer). It is NOT intended to duplicate the employee orientation provided by the company.

STEP 1: New Employee Orientation

Includes “Prior to Employee Starting in Organization Checklist”

Includes Intern Onboarding (Step 1.1) (separate checklist)

STEP 2: Onboarding List for Employees or Manager Checklist

STEP 3: Onboarding Meet with Manager Checklist

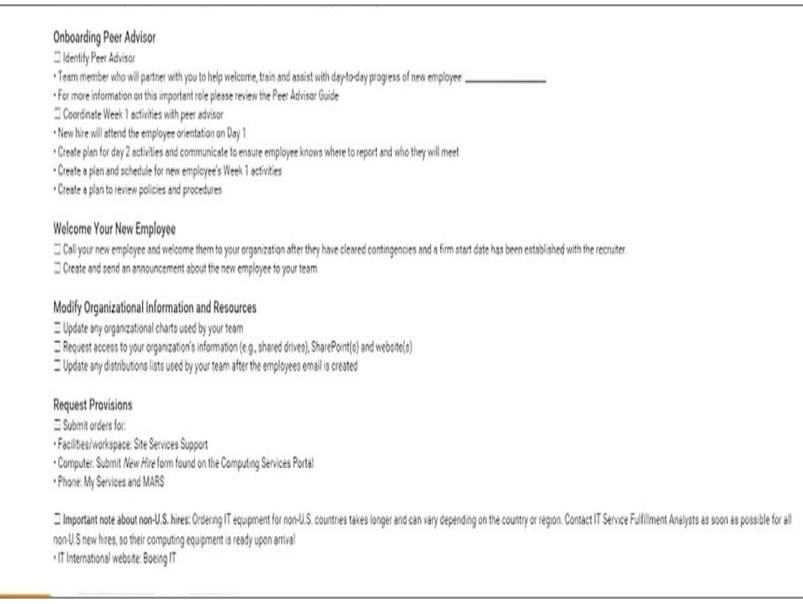
STEP 4: Onboarding at the job role level

STEP 1: New Employee Orientation/Pre-Onboarding Manager Checklist

New employee orientation is handled by Human Resources. This checklist covers management responsibilities and tasks PRIOR to an employee joining the organization and also picks up where new employee orientation ends.

Managers –complete the following checklist prior to arrival new organizational employees.

New Employee Orientation Manager Checklist for Prior to Employee Start Date	Purpose
New to Company	
Employee Onboarding Framework and Checklist (from HR system)	Reference/Awareness for manager

<h2>New Employee Orientation</h2> <h3>Manager Checklist for Prior to Employee Start Date</h3>	<h3>Purpose</h3>
<p>New Employee Onboarding</p> <p>NOTE: Manager will have Onboarding Checklist and Actions available in HR system (see sample picture below)</p> <p><input type="checkbox"/> Complete the Onboarding Setup in HR system</p> 	<p>Reference/Awareness for manager</p>
<p><input type="checkbox"/> Complete the Pre-Arrival Checklist in HR system (see sample picture below) Accessible via Manager Onboarding Toolkit.</p> 	<p>Manager reviews checklist to ensure all necessary steps or tasks were completed.</p>
<p><input type="checkbox"/> Obtain laptop for employee</p> <p>NOTE: If employee needs Mac (rather than PC), refer to the appropriate wiki for setup and troubleshooting information.</p>	<p>Per process (<i>need link</i>)</p>
<p><input type="checkbox"/> Obtain any peripherals needed for the job including hardware, software, etc.</p>	<p>Per process (<i>need link</i>)</p>

New Employee Orientation Manager Checklist for Prior to Employee Start Date	Purpose
<input type="checkbox"/> Obtain desk location for employee <ul style="list-style-type: none"> • Contact Staff Analyst for available desk locations 	
<input type="checkbox"/> Obtain phone for employee (cell, desk phone or both)	Wireless Store Desk Phone (includes ordering accessories)
<input type="checkbox"/> Peer Advisor Activities Reference the Peer Advisor Guide (available in HR system) <ul style="list-style-type: none"> <input type="checkbox"/> Identify Peer Advisor <input type="checkbox"/> Inform Peer Advisor <input type="checkbox"/> Schedule meeting between Peer Advisor and new employee 	Manager should identify an employee who will act as Peer Advisor/mentor for new employee. Ensure the Peer Advisor is aware of the PA responsibilities. Schedule meeting with PA and new employee for first or second day of new employee's employment.

For those employees who are not new to the company, just new to the organization, Managers should review and complete the following checklist.

New to Organization	
<input type="checkbox"/> Review Hiring Manager Checklist	Manager reviews checklist to ensure all necessary steps or tasks were completed.
<input type="checkbox"/> Obtain laptop for employee NOTE: If employee needs Mac (rather than PC), refer to the appropriate wiki for setup and troubleshooting information.	Per process (need link)
<input type="checkbox"/> Obtain any peripherals needed for the job including hardware, software, etc.	Per process
<input type="checkbox"/> Obtain desk location for employee <ul style="list-style-type: none"> • Contact Staff Analyst for available desk locations 	
<input type="checkbox"/> Obtain phone for employee (cell, desk phone or both)	Wireless Store Desk Phone (includes ordering accessories)
<input type="checkbox"/> Peer Advisor Activities Reference the Peer Advisor Guide (available in HR system) <ul style="list-style-type: none"> <input type="checkbox"/> Identify Peer Advisor <input type="checkbox"/> Inform Peer Advisor <input type="checkbox"/> Schedule meeting between Peer Advisor and new employee 	Manager should identify an employee who will act as Peer Advisor/mentor for new employee. Ensure the Peer Advisor is aware of the PA responsibilities. Schedule meeting with PA and new employee for first or second day of new employee's employment.

STEP 2: Managers – complete the following checklist with all new organizational employees. Provide copy to employees so they have access to links and information.

Organizational Onboarding Items	Purpose	Who
Meeting with Manager		
<input type="checkbox"/> Meet with your manager	See <i>STEP 3:Meet with Manager</i> checklist	Manager
<input type="checkbox"/> Work with assigned Peer Advisor	Explain purpose of peer advisor (help welcome employee, train and assist with day-to-day progress of employee, etc.)	Manager
<input type="checkbox"/> Access <ul style="list-style-type: none"> • Accounts and site access • SharePoint sites, servers, etc. 	This is the administrative servers, SharePoints, etc. used by the specific group. Access for specific projects or applications is not listed here.	Manager and Mentor
<input type="checkbox"/> Performance and Development Expectations <ul style="list-style-type: none"> • HR system 	Review and identify schedule for evaluations and reviews	
<input type="checkbox"/> HR System – complete Onboarding actions listed in HR system (via Onboarding icon)		Employee
<input type="checkbox"/> HR System – Monitor completion of onboarding actions listed in HR system (via Manager Onboarding Toolkit)		Manager

Organizational Information		
<input type="checkbox"/> Review Organizational Information including, but not limited to: <ul style="list-style-type: none"> • Vision, Mission, Goals • Strategy and Priorities • Employee Portal • Statement of Work • Organizational Charts (including management structure) 	Review the list to ensure employee has a good understanding of the organization. Be sure to provide links so employee can refer back to the information, as needed.	Manager
<input type="checkbox"/> Org-level Processes <ul style="list-style-type: none"> • Travel policy process (request and approval) • Training requests • Expense report policy and process 	Review the list to ensure employee has a good understanding of the processes within the organization. Be sure to provide links so employee can refer back to the information, as needed.	

Safety, Site/Building Orientation		
<input type="checkbox"/> Safety	Review safety rules and requirements	Manager
<input type="checkbox"/> Emergency information and reporting	Describe how to respond to an emergency at work, include a fire, earthquake, severe weather event, flood, bomb threat, shooting, etc.	Manager
<input type="checkbox"/> Safety and evacuation for site/building	Review safety information for location including evacuation assembly and Shelter-in-Place	Manager
<input type="checkbox"/> Review Location/Site Information	Include anything specific or unique about the location	Manager
<input type="checkbox"/> Any other items of note (parking, cafeteria, security, etc.)		Manager

STEP 2: Managers – complete the following checklist with all new organizational managers. Provide copy to the onboarding manager so they have access to links and information.

Organizational Onboarding Items	Purpose	Who
Organizational Information		
<input type="checkbox"/> History and Story of the organization	Review the history of the organization and how we arrived at this point.	
<input type="checkbox"/> What is the Purpose and Intent of the organization	Explain the purpose and intent of the organization (this ties in with the Vision & Mission)	
<input type="checkbox"/> Review Organizational Information including, but not limited to: <ul style="list-style-type: none"> ○ Vision, Mission, Goals ○ Strategy and Priorities ○ Employee Portal ○ Statement of Work ○ Organizational Charts (including management structure) 	Review the list to ensure employee has a good understanding of the organization. Be sure to provide links so employee can refer back to the information, as needed.	Manager
<input type="checkbox"/> Org-level Processes <ul style="list-style-type: none"> ● Travel policy process (request and approval) ● Training requests ● Expense report policy and process 	Review the list to ensure employee has a good understanding of the processes within the organization. Be sure to provide links so employee can refer back to the information, as needed.	
<input type="checkbox"/> Key Contacts	Provide manager the list of contacts and focus for various functions and roles (HR, Finance, Compliance, etc.)	FYI
<input type="checkbox"/> Finance 101	Talk with Finance Rep for finance review and training	Manager and Finance Rep

Safety, Site/Building Orientation		
<input type="checkbox"/> Safety	Review safety rules and requirements	Manager

Safety, Site/Building Orientation		
<input type="checkbox"/> Emergency information and reporting	Describe how to respond to an emergency at work, include a fire, earthquake, severe weather event, flood, bomb threat, shooting, etc.	Manager
<input type="checkbox"/> Safety and evacuation for site/building	Review safety information for location including evacuation assembly and Shelter-in-Place	Manager
<input type="checkbox"/> Review Location/Site Information	Include anything specific or unique about the location	Manager
<input type="checkbox"/> Any other items of note (parking, cafeteria, security, etc.)		Manager

Meeting with Manager		
<input type="checkbox"/> Meet with your manager	See <i>STEP 3:Meet with Manager</i> checklist	Manager
<input type="checkbox"/> Be assigned a Manager Peer Advisor	Explain purpose of peer advisor (help welcome employee, train and assist with day-to-day progress of employee, etc.)	Manager
<input type="checkbox"/> Access <ul style="list-style-type: none"> • Accounts and site access • SharePoint sites, servers, etc. 	This is the administrative servers, SharePoints, etc. used by the specific group. Access for specific projects or applications is not listed here.	Manager and Mentor
<input type="checkbox"/> Performance and Development Expectations <ul style="list-style-type: none"> • HR system 	Review and identify schedule for evaluations and reviews	
<input type="checkbox"/> HR System – complete Onboarding actions listed in HR system (via Onboarding icon)		Employee
<input type="checkbox"/> HR System – Monitor completion of onboarding actions listed in HR system (via Manager Onboarding Toolkit)		Manager

STEP 3: Managers – complete the following checklist with all new Managers.
Provide copy to new manager so they can complete the “Notes” section, as needed.

“Meet with Manager” Checklist	Notes
<input type="checkbox"/> Complete Onboarding checklist (Step 2)	
<input type="checkbox"/> Review Work Schedule <ul style="list-style-type: none"> ● work week guidelines (flexing, etc.) ● overtime policy ● vacation and sick leave policy (aka PTO) ● holiday schedule 	
<input type="checkbox"/> Review Timekeeping/Charging Instructions <ul style="list-style-type: none"> ● how to flex schedule ● how to enter vacation in advance 	
<input type="checkbox"/> Review Virtual Office/Telecommuting Policy	
<input type="checkbox"/> Review Communication, Contact, & Availability Guidelines <ul style="list-style-type: none"> ● planned absences and unplanned absences policy (who and how) ● Is there a group calendar ● Required calendar information (i.e., list hours and backups) ● Status via Microsoft Lync 	
<input type="checkbox"/> Review E-mail signature Guidelines <ul style="list-style-type: none"> ● What should be included? ● What is not allowed? (i.e., graphics, images, etc.) 	
<input type="checkbox"/> Review Staff Meeting schedule	
<input type="checkbox"/> Identify Other Recurring Meetings – list of meetings and their purpose <ul style="list-style-type: none"> ● One-on-One meeting with senior manager ● Other meetings, as applicable ● Group Operating Cadence 	
<input type="checkbox"/> Review Group and organizational distribution lists	

"Meet with Manager" Checklist	Notes
<input type="checkbox"/> Review Mandatory Training list – including deadlines	
<input type="checkbox"/> Validate Safety Information for the location	
<input type="checkbox"/> Recycling Policy for the site	
<input type="checkbox"/> Kitchen locations and policy	Review location of kitchens, microwaves, refrigerators, coffee, etc.
<input type="checkbox"/> Review statement of work, expectations, and next steps	
<input type="checkbox"/> Review Manager's assigned group and explain the various roles in group	
<input type="checkbox"/> Introduce Manager Peer Advisor	
<input type="checkbox"/> Schedule onboarding follow-up meeting within 30 days	
<input type="checkbox"/> HR System – complete Onboarding actions listed in HR System (via Onboarding icon)	

STEP 3: Managers – complete the following checklist with all new organizational employees. Provide copy to employee so they can complete the “Notes” section, as needed.

“Meet with Manager” Checklist	Notes
<input type="checkbox"/> Complete AIMS Onboarding checklist (Step 2)	
<input type="checkbox"/> Review Work Schedule <ul style="list-style-type: none"> ● work week guidelines (flexing, etc.) ● overtime policy ● vacation and sick leave policy (aka PTO) ● holiday schedule 	
<input type="checkbox"/> Review Timekeeping/Charging Instructions <ul style="list-style-type: none"> ● how to flex schedule in timekeeping system ● how to enter vacation in advance 	
<input type="checkbox"/> Review Virtual Office/Telecommuting Policy	
<input type="checkbox"/> Review Communication, Contact, & Availability Guidelines <ul style="list-style-type: none"> ● planned absences and unplanned absences policy (who and how) ● Is there a group calendar ● Required calendar information (i.e., list hours and backups) ● Status via Microsoft Lync 	
<input type="checkbox"/> Review E-mail signature Guidelines <ul style="list-style-type: none"> ● What should be included? ● What is not allowed? (i.e., graphics, images, etc.) 	
<input type="checkbox"/> Review Staff Meeting schedule	
<input type="checkbox"/> Identify Other Recurring Meetings – list of meetings and their purpose <ul style="list-style-type: none"> ● One-on-One meeting with manager ● Other meetings, as applicable ● Group Operating Cadence 	
<input type="checkbox"/> Review Group and organizational distribution lists	

"Meet with Manager" Checklist	Notes
<input type="checkbox"/> Review Mandatory Training list – including deadlines	
<input type="checkbox"/> Validate Safety Information for the location	
<input type="checkbox"/> Recycling Policy for the site	
<input type="checkbox"/> Kitchen locations and policy	Review location of kitchens, microwaves, refrigerators, coffee, etc.
<input type="checkbox"/> Review employee's statement of work, expectations, and next steps	
<input type="checkbox"/> Review group and explain the various roles in group	
<input type="checkbox"/> Introduce Peer Advisor	
<input type="checkbox"/> Schedule onboarding follow-up meeting within 30 days	