

## Onboarding Checklist

There are many items to cover prior to a worker’s first day. To help you start your preparations, this worksheet outlines important steps including required paperwork. Use the space provided to write notes and next steps to help you get ready for your new team member.

Onboarding Steps	Notes & Next Steps
<p><b>Prepare for onboarding &amp; 1<sup>st</sup> day</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Create an onboarding checklist to ensure you cover the basics and legal requirements</li> <li><input type="checkbox"/> Follow policies in your employee handbook</li> <li><input type="checkbox"/> <a href="#">Set up a personnel file</a> with limited access that ensures confidentiality</li> <li><input type="checkbox"/> Order equipment and setup accounts</li> <li><input type="checkbox"/> Schedule an orientation and key meetings</li> <li><input type="checkbox"/> Send a welcome email with details like when and where to arrive, transportation options, who to report to, and attire (if applicable)</li> </ul>	
<p><b>Shape the 1<sup>st</sup> day &amp; week</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Welcome the worker and share an overview of the coming days</li> <li><input type="checkbox"/> Provide orientation that reviews employee handbook and covers expectations on conduct, schedules, and other aspects of team behavior and workplace culture</li> <li><input type="checkbox"/> Provide a safety orientation</li> <li><input type="checkbox"/> Review job duties, responsibilities, and position expectations</li> <li><input type="checkbox"/> Provide equipment, keys, account logins, etc.</li> <li><input type="checkbox"/> Tour the workplace – bathrooms, fire exits and locations important to safety, and any other key spaces</li> <li><input type="checkbox"/> Build in breaks and provide everything in writing (new hires have a lot to take in)</li> </ul>	
<p><b>Complete new hire paperwork</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Register new hire with <a href="#">Washington State Department of Social and Health Services</a></li> <li><input type="checkbox"/> Update your worker’s compensation account</li> <li><input type="checkbox"/> <a href="#">W-4 tax withholding form</a></li> <li><input type="checkbox"/> <a href="#">I-9 form</a> employment verification</li> <li><input type="checkbox"/> Complete direct deposit form</li> <li><input type="checkbox"/> Complete benefit enrollment forms</li> <li><input type="checkbox"/> Review and sign other paperwork your organization may have like confidentiality agreements, conflict of interest, and equipment agreements</li> <li><input type="checkbox"/> Provide written/electronic notification of <a href="#">sick leave rights</a></li> </ul>	