FREE DOWNLOAD

CHECKLIST TEMPLATE

PROCESS MONITOR / MENTOR	PREPARATORY				ORIENTATION			
	Upon Hire Decision		Prior to Start Date		First Day(s)		First Week(s)	
MANAGER	Create new hire schedule	☐	Add/invite to existing meetings	☐	Welcome upon arrival, guide to work station / office	☑	Learn about the first weeks experience	☑
	Designate coworker / peer resource	☐	Call to confirm start date and time	☐	Confirm receipt/functionality of passkeys	☐	Assist with any questions	☐
	Review potential relocation needs	☐	Create welcome packet	☐	Deliver prepared welcome packet	☐	Review training schedule	☐
	Identify HR point of contact	☐	Notify department, HR, and IT	☐	Discuss break / meal policies	☐	Review all technology functionality	☐
		☐	Schedule any pertinent training	☐	Discuss trial period, if applicable	☐	Discuss ongoing projects	☐
		☐		☐	Introduce to designated peer resource	☐	Review company mission statement	☐
OFFICE ADMINISTRATOR	Submit technology requests	☐	Secure work area / station	☐	Provide company structure sheet	☐		☐
	Order passkeys, IDs, and more	☐	Designate space	☐	Provide company contact list access	☐		☐
		☐	Supplies, furniture, etc.	☐	Provide any maps, parking slots, etc.	☐		☐
		☐	Phone installation and setup	☐		☐		☐
		☐	Get nameplate, business cards, etc.	☐		☐		☐
		☐		☐		☐		☐
HUMAN RESOURCES	Create personnel file	☑	Confirm receipt of all recruitment documents	☐	Connect to complete any paperwork	☐	Review company policies	☐
		☐	Confirm offer letter receipt/acceptance	☐	Review the online portal	☐	Ask an employee about the first weeks	☐
		☐	Confirm background check completion	☐	Sign offer letter, if necessary	☐	Get feedback from the manager about your new hire	☐
		☐	Communicate business practices and policies	☐	Enroll in any offered benefits or services	☐		☐
		☐	Enroll in new hire briefing, webinar, etc.	☐	Discuss company culture and work style	☐		☐
TECHNOLOGY		☐	Passkey order form	☑	Review software, hardware, printers, etc.	☐		☐
		☐	Temporary access for contract new hire	☑	Confirm email setup	☐		☐
		☐	Software acquisition	☑	Confirm phone setup	☐		☐
		☑	Print driver setup	☑	Assist with online directory setup	☐		☐
		☐	Hardware setup	☑	Review tech acceptable use policies	☐		☐
DESIGNATED COWORKER / PEER RESOURCE		☐		☐	Conduct tours	☐	Periodic check-ins	☐
		☐		☐	Answer any questions	☐		☐
		☐		☐	Offer to have lunch	☐		☐
		☐		☐	Make peer introductions	☐		☐
		☐		☐		☐		☐
DEPARTMENT LEAD (if applicable)		☐		☐		☐		☐
		☐		☐		☐		☐
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