**Regular Employee**

[INSERT ORGANIZATION LOGO HERE]

**Onboarding Checklist**

|  |  |  |  |
| --- | --- | --- | --- |
| First Name |  | Last Name |  |

**One week prior**

**HR Department:**

[ ]  **Create Personnel Files**

Refer to Employee Checklist and Guidelines to create a personnel file and a CONFIDENTIAL personnel file for the employee. Include all completed forms.

[ ]  **Letter of Employment**

Signed Letter of Employment to be filed in the employee’s personnel file.

[ ]  **Company Announcement**

Send a company-wide announcement to the staff and board introducing the new employee; include their start date.

[ ]  **Assign Onboarding Leads**

Assign an individual who is responsible for onboarding the new hire.

[ ]  **Contact New Employee**

Contact the new employee before their start date with logistics about start time, office location, parking, etc. Also send HR forms (see below) for completion to add to personnel file.

[ ]  **Staff Appointment Form**

To be filed in the employee’s personnel file.

[ ]  **Signed Acknowledgement of Employee Handbook**

Provide employee with a copy of the Employee Handbook. Signed Acknowledgement of Employee Handbook to be filed in employee’s personnel file.

[ ]  **Confidentiality Agreement**

Signed Confidentiality Agreement to be filed in employee’s personnel file.

[ ]  **Conflict of Interest Declaration**

Signed Conflict of Interest Declaration to be filed in employee’s personnel file.

[ ]  **Direct Deposit Form**

To be filed in employee’s **confidential** personnel file.

[ ]  **Emergency Contact Information**

To be filed in employee’s personnel file.

[ ]  **Vaccination Record**

To be filed in employee’s personnel file, if applicable.

[ ]  **Certification and/or Training Records**

To be filed in employee’s personnel file, if applicable.

[ ]  **Workstation Set Up**

Set up employee’s workstation (i.e. desk, office supplies, etc.). Ensure any handover documents are up to date.

[ ]  **Notify the Provincial Divisions Office**

Notify the Provincial Divisions Office of the new Executive Director and submit requests for the following:

* Email address
* Member account
* Access to other required central IT platforms

[ ]  **Computer Access**

Request or assign a computer and arrange for passwords and access to:

* Computer drives
* Email address
* Phone number
* Other communication devices, if applicable

[ ]  **Security System Access**

Arrange for a security system access card and keys.

[ ]  **Office Phone List**

Update office phone list with the new hire’s information; distribute to staff and board.

**First Day**

**Manager:**

[ ]  **Introduction to Staff**

Arrange one-on-one meetings or an all staff meeting for an introduction of the employee to the staff.

[ ]  **Equipment and Tools**

[ ]  Computer/Laptop [ ]  Phone [ ]  Cards/Keys [ ]  Shared Files

[ ]  Other \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

[ ]  **Office Tour**

Provide a tour of the office including washrooms and emergency exits, as applicable.

[ ]  **Health and Safety Orientation**

Refer to Health & Safety Orientation Checklist, signed document to be filed in employee’s personnel file.

[ ]  **Organization Orientation**

Provide an orientation to the employee with the following items in mind:

[ ]  **General HR Information**

* Code of conduct, dress code, hours of work, meal and rest breaks, etc.
* Expectations related to internal and external communications
* Job description, expectations/deliverables, key relationships, other team members
* Probation period requirements

[ ]  **Organization Overview**

* History and culture, including the local state of health care and community demographics
* Organizational chart
* Team members’ contact information
* Current strategic and operational plan
* Recent financial information, if applicable

[ ]  **Email and Phone Systems**

Assist employee with setting up a voicemail message and email signature, as per requirements.

**First Week**

**Manager:**

[ ]  **Meeting Invitations**

Provide calendar invitations to any upcoming meetings that employee is expected to attend.

[ ]  **Update Website and Business Cards**

Update website with employee’s name, position and bio. Order business cards, as required.

[ ]  **Performance Goals**

Develop suitable goal(s) for the probation period to include in the Performance Review – Probation Period.

[ ]  **Check-In Meeting**

Arrange a check-in meeting within the first week to address any issues, questions or concerns.

**First 1-3 Months**

**Manager:**

[ ]  **Group Benefits Registration**

If applicable, register employee to Group Health and Welfare Benefits Plan, or have employee complete the Benefits Opt-Out Waiver.

[ ]  **Performance Review**

With the employee, complete the Performance Review – Probation Period after their first 6 to 8 weeks of work, and again after their first 11 to 12 weeks (before their probationary period is complete).

[ ]  **Performance Review: 6 to 8 weeks**

[ ]  **Performance Review: 11 to 12 weeks**

[ ]  **Additional Arrangements and Notes**

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|  |  |  |  |
| --- | --- | --- | --- |
| Signature(Employee) |  | Date |  |
| Signature(Manager) |  | Date |  |
| Signature(HR Department) |  | Date |  |