Sample Orientation Checklist

<table>
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<tr>
<th>Employee Name</th>
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<tbody>
<tr>
<td>Position</td>
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<tr>
<td>Start date</td>
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**Prior to Start**
- Advise staff of the new employee’s name, position, and start date
- Arrange for a workspace
- Equip the workplace with the necessary furniture, equipment and supplies
- Ensure that all equipment is working
- Set up an e-mail address
- Set-up a telephone extension
- Add the employee to company lists-telephone, e-mail
- Make a copy of the job description
- Gather information, reports, etc to give the person on the first day
- Ensure the staff handbook is up-to-date
- If the employee will need a key to access the office, arrange to have it ready for the first day
- Contact the new employee to confirm where and when they should report on the first day
- Set up the orientation team-who will be doing what for the orientation
- Decide what meaningful tasks the new employee will start on and prepare the necessary background material

**First Day**
- Keep your schedule as free as possible for the first day

**Getting Started**
- Welcome the new employee
- Outline the orientation process for the day
- Introduce the new employee to his/her coworkers
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- Introduce the new employee to his/her 'buddy'
- Give the employee a tour of the assigned workspace and the rest of the office/facility including:
  - Where to safely put belonging (if not in their office)
  - Where to hang coat, store lunch; location of the washrooms
  - Location of the photocopier, fax machine, and supplies, etc.

Organizational Overview
- Overview of the company
- Organization Chart

Job Duties and Responsibilities
- Review the employee’s job description and expected outcomes
- Explain how the job is related to the other jobs in the company
- Give specific outcomes for the first day such as a look at the company’s website, review of a specific document, etc.
- Identify the work that needs to be accomplished in the first week
- Give the employee reports, information that is need for the job and explain what each item is

Work expectation
- Start and finish times
- Lunch time
- Probationary period
- Safety procedures, as appropriate

Administration
- Complete the necessary paperwork for pay and benefits
- Complete other paperwork as required
- Identify options for parking
- Provide password for equipment as appropriate

Other
- Review health and safety procedures
- Allow for time for the new employee to set up their workspace, review the materials you have given, etc.
- Take the employee out to lunch
- Have a task planned for the first day

First Two Weeks
- Check to see if there are any problems with equipment or the workspace
- Ensure that the employee has met all the other staff members
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- Review the performance management system
- Order business cards, if appropriate
- Tour other sites of the company, if applicable
- Explain the internal communication process including staff meetings
- Have the employee review the policies and procedures manual
- Explain how absences are called in and covered, telephone and e-mail protocol, internet use policy
- Explain the travel and reimbursement process
- Ask if the new employee has any question or if there is anything that needs to be addressed
- Confirm that the employee understand what is expected-duties and responsibilities
- Review all fire and safety procedures

First Six Months

- Review probation procedures
- Schedule regular meetings with the new employee to ensure that they are on track
- Establish performance expectations