

ORIENTATION CHECKLIST

Before Day 1

- ☐ Give the new employee a “Welcome Package.” Include a letter to congratulate them on the new job, let them know how to report in on the first day, and give them guidelines on how to dress.
- ☐ Choose someone to act as a sponsor or mentor for the new employee.
- ☐ Set the employee’s workspace up with everything they might need.
- ☐ Let other employees know when the new employee will arrive, where they are coming from, and what they will be doing.

Day 1

- ☐ Introduce the new employee to their co-workers, other staff, and key personnel including senior managers.
- ☐ Give the new employee a tour of the company, their work area, and their department.
- ☐ Make sure the employee gets the keys, security codes, passes, and technology (laptop, phone, etc.) they need.
- ☐ Set aside time to eat lunch with the new employee and their sponsor or mentor on the first day, if possible.
- ☐ Review your company’s Environmental Health and Safety Information.
- ☐ Go over the following with the new employee:
 - a) **Expectations for the Job**
 - responsibilities that come with this job
 - overview of the job description and duties
 - role of the supervisor
 - b) **Departmental Procedures**
 - dress code and notes about appearance
 - guidelines about confidentiality
 - length of the probation period
 - pay schedule
 - role and standards for customer service
 - guidelines for personal calls and visitors
 - c) **Work Schedule**
 - work hours
 - lunch and break times
 - rules for overtime
 - rules around being on time
 - rules for using a time clock or time sheets
 - guidelines for storm days
 - guidelines for taking time off
 - rules around taking sick leave and reporting illness
 - d) **Important Information**
 - phone and email lists for all employees
 - schedules for staff meetings

Week 1

- ☐ Discuss the company’s policies and let the employee know how to access them.
- ☐ Go over the process the company uses for performance appraisals if you have one.
- ☐ Help the employee understand the company’s annual goals. Invite them to set their own performance and professional development goals.
- ☐ Talk about how the department works and go over these points:
 - department chart – highlight the names and duties of key personnel and who to contact if their supervisor is not available
 - history of the department
 - goals of the department
 - the department’s current and future needs, including its mission and vision
 - how the employee’s job fits into the company as a whole and contributes to its success and core values