**REGULAR EMPLOYEES - ONBOARDING CHECKLIST**

Name of Employee: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**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 employee’s personnel file.*

* COMPANY ANNOUNCEMENT

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

* ASSIGN ONBOARDING LEAD

*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 the HR forms (see below) for completion to add to personnel file.*

* STAFF APPOINTMENT FORM

*To be filed in 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 Form 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 (e.g. desk; business cards; office supplies; etc.). Ensure any handover documents are up to date.*

* IT SET-UP

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

* NOTIFY THE PROVINCIAL DIVISIONS OFFICE

*Notify the Provincial Divisions Office of new hire 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, if applicable.*

* OFFICE PHONE LIST

*Update office phone list with 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 & 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 & SAFETY ORIENTATION

*Refer to Health & Safety Orientation Checklist and 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 & 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 & 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 & NOTES

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Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Employee)

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 (HR Department)

Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

 (Manager)