

New Employee Orientation Checklist

Welcoming a new employee to your organization is an exciting opportunity, and it's important to put your best foot forward when onboarding them to the team. Use this checklist to make sure you're covering all your bases during an employee's orientation—and don't forget to make a plan with your colleagues regarding who will cover each aspect of training.

Throughout the orientation, encourage new employees to ask questions.

WELCOME (MENTOR)

- Meet the new employee upon their arrival and give them a warm welcome.
- Don't rush into business mode! Have a casual conversation with the employee to learn more about them and make them feel comfortable.
- Provide them an employee manual or handbook.
- Offer some background information on the organization. What is your mission? What are your values?

WORKPLACE INTRODUCTION (MENTOR)

- Take the new employee on a tour of the workspace and introduce them to their coworkers.
- Give an overview of your organizational structure and explain how the employee's role fits within it.
- Show them where they'll be working and take a moment to introduce them to their supervisor. Now is a great time to go over any management structures you have in place, like whom the employee should report to if their supervisor is out of the office.
- If the organization is unionized, introduce the employee to the shop steward.
- Take a moment to regroup after all the introductions have been made. The new employee will likely have some follow-up questions.

WORKPLACE CULTURE (MENTOR)

- Explain expectations for maintaining a healthy work/life balance within the organization.
- Make sure the new employee is aware of start/end times, breaks, shift changes, scheduling expectations, and any other important deadlines.
- Share any common workplace acronyms and terms they might encounter.
- Discuss any accommodations that are offered to employees (e.g., accessibility aids, religious accommodations).

POLICIES AND PROCEDURES (HR OR MANAGEMENT)

- Share any information on the dress code/uniform, personal grooming requirements, and scent policies.
- Explain or point to protocols for handwashing, public washroom etiquette, and avoidance of cross-contamination/germ spreading.
- Offer information on the organization's harassment policy, including how to make a complaint.
 - Include information on how to deal with harassment from customers, as well as how to address customer complaints.
- Provide information on lateness/absences, personal emergencies, and personal phone calls during work hours.
- Provide training on assisting customers with specific accessibility needs.

JOB RESPONSIBILITIES (SUPERVISOR)

- Go over the new employee's job description and tasks. Tell them your expectations related to performance.
- Show them where to find any equipment or tools they need to do their job and offer training on how to use them. Remember to review any safety concerns they may encounter.

WORK EQUIPMENT, IF APPLICABLE (SUPERVISOR)

- Make sure you give the employee training on how to use:
 - Point of sale systems
 - Commonly used software
 - Communication systems (like email accounts or project management programs)
 - Telephones (e.g., how to access voicemail or make long-distance calls)
 - Kitchen appliances
- Don't forget to give the employee any logins they might need to get started!

WORK CONDITIONS (HR OR MANAGEMENT)

- Make sure the employee understands all the details related to their compensation. This includes:
 - Their wage and benefits package
 - Any health, life, disability insurance, and retirement benefits available to them
 - Any employee assistance programs available to them, like educational or child-care assistance
 - Any incentive or bonus programs
 - Their credit union information and stock purchase plan (if applicable)

- It's also important to review:
 - The conditions of the employee's probationary period
 - The organization's pay procedures and schedule
 - Policies around paid/unpaid leave and overtime hours
- Make sure the employee knows how to access:
 - Employee parking
 - Entrances and exits
 - Sign in/sign out sheets
 - Change rooms and lockers
 - Washrooms
 - Lunch rooms or cafeterias
 - Security systems, like fire alarms, fire extinguishers, emergency exits, and service elevators

OCCUPATIONAL HEALTH AND SAFETY (HUMAN RESOURCES, MANAGEMENT, AND MENTOR)

- Explain what kind of safety equipment the employee should be using on the job. This includes:
 - Personal protective equipment (PPE)
 - Safety equipment for tools and machines
- Don't forget, employees have the right to refuse work if they feel a situation is unsafe. Let the new employee know they should never feel pressured to put themselves at risk. Instead, train them on reporting the following to their supervisor:
 - Health and safety violations
 - Broken or malfunctioning equipment

EVALUATION AND DEVELOPMENT (HR OR MANAGEMENT)

- Describe your organization's performance review processes/possible salary increases.
- Provide information on training and professional development opportunities.
- Explain what training will look like during the probationary period.
- Discuss any certification programs the employee will need to participate in.