

New Employee Orientation Checklist

Your new employee orientation checklist should have the proper paperwork needed for the employee to start working. This includes Federal and State Income Tax Withholding Documents, Federal Employment Eligibility Documents and an employee contract that outlines job duties and title. You should review these documents, and any others, with your new employee and then go over benefits and have them sign the documents. You should also give a tour of your workplace and introduce the employee to their teammates and people they will be working with. Let your other employees know ahead of time that a new employee will be starting. This way they can set up a lunch or other “ice-breaker” activity.

Administrative Tasks for a New Hire

On a new employee’s first day, there’s quite a bit of paperwork to review and sign in order to complete the hiring process. It’s also a good opportunity to educate the new employee about your small business’s policies and procedures, workplace, and benefits programs.

Gather The Proper Paperwork

You or your HR manager should have a folder with all the papers a new employee must review and sign. Don’t forget to get all necessary signatures. These documents include:

- An employment contract that outlines... job title and classification (that is, full-time or part-time), duties and expectations, employment period (ongoing or a set time period), regular work schedule, vacation and sick time, salary, benefits, job performance evaluation methods and standards, and termination conditions and procedures
- Confidentiality and/or non-compete agreements if necessary
- Federal income tax withholding Form W-4, which allows you to withhold the proper portion of their salary for federal income taxes
- Federal employment eligibility Form I-9, which verifies you have confirmed the new employee’s eligibility to work in the United States
- State new hire notification paperwork, which will vary, depending on each state’s hiring notification requirements
- State income tax withholding form if applicable
- Direct deposit information for paychecks
- Designation of beneficiary forms (for example, for life insurance, retirement account, etc.)
- Review Company Policies and Procedures

It's crucial to go over your small business policies and procedures before a new employee starts working. This will protect you legally and help the employee understand key details. You should provide a copy of your employee handbook and have the employee sign off that they have read and understand it. If you don't have a handbook, you can provide the information and gather signatures by topic. Your review of policies and procedures should include:

- Notification and consent for random or regular alcohol/drug testing if required
- Work and vacation policies, procedures, and requirements (overtime, vacation time, sick days, process for notification of absence due to illness or planned vacation, unpaid time off, whether employee can make up missed days, etc.)
- Safety and security (get employee emergency contact information, gather medical/food allergy information employee wishes to share, review building safety and evacuation procedures)
- Electronics use and privacy (rules for use of email and internet and social media during work hours, personal use of company devices, discussing the job/company on social media or other platforms)
- Presentation and job performance (dress code, behavior, visitors at work)
- Go Over Benefits and Gather Signatures!

The benefits you offer are one of the most important perks for your new hire. It's crucial to provide documents that explain the benefits and to have employees make any necessary choices (for example, the type of health plan and whether they want to purchase additional life insurance) and fill out and sign any required forms. The benefits you review will depend on what you offer and may include:

- Health insurance
- Dental and vision insurance
- Disability insurance
- Life insurance
- Retirement plan
- Other perks (employee wellness plan, cell phone reimbursement, pet insurance, etc.)

Take plenty of time to answer any questions your new hire has about benefits. This will make the employee feel valued from the start and help prevent misunderstandings down the road.

Offer Orientation to the Company and Job

A new employee can build the right momentum from the start if he or she has the space and tools needed to do their job. Here's how to help your new hire get to work quickly:

1. Clear Your Schedule

Make sure you're free to personally welcome and help your new hire settle in. Pushing this task onto an administrative assistant or other employee can make the new employee feel less than welcome. Change any conference calls or meetings so you can be fully available.

2. Give a Tour of Your Workplace

Offering a tour right away will help the employee feel more confident and at home. Show the employee: bathrooms, meeting rooms, the printer/copier, and where they can find needed supplies (pens, notebooks, etc.). This is also a good time to physically point out safety features such as the first aid kit, fire extinguishers, and stairwells to be used for emergency evacuation.

3. Provide an Office or Desk and Supplies

Make sure the new employee has everything needed to get settled in. For example, you might need to: Set up a company email account and arrange access to other accounts the employee will need to use. If you use a small business project management tool, the employee may need a username and login credentials. Provide access to hardware and devices (computer, tablet, telephone, etc.) You or your IT pro will need to set up the new employee's computer and logins. Arrange this ahead of time to avoid delays and downtime on the employee's first day.

Give the new employee a badge, keys, and any other credentials or tools they need. If necessary, have their photo taken for their employee ID card. Order business cards for the new hire if applicable.

4. Offer a Training Road Map

You or a member of the team will have to train the new employee on key duties and processes. Explain the training process. Offer a written outline of how training will unfold. This will help ensure the employee knows what to expect in the first days and weeks on the job.

5. Give the New Employee a Task

Ask your new hire to do a simple job-related task on day one. This allows them to feel like a productive member of the team from the get-go and primes them to take on more responsibilities.

Offer a Warm Welcome to the Team

First impressions matter, and it's important to make a new employee feel like part of something important. Here's what to do on day one:

1. Make Introductions to Other Employees

Have your new hire meet the rest of the team as soon as possible. This will avoid any awkward moments around the water cooler. Give employees a heads up as to when you'll be making the rounds, so they'll be ready to say hello.

2. Hold a New Hire Lunch

If you have a very small team, go out to lunch on the first day of work. Otherwise, consider having a simple catered meal at the office. This offers an opportunity for your new staff member to chat with others in a relaxed setting.

3. Pair the New Hire Up with a Coworker

An “office buddy” can answer questions and help the new employee get settled in comfortably. Choose a helpful employee with a good attitude. Make sure the “buddy” is committed to your small business. The strategy could backfire if the person in charge of helping your new hire is someone who gossips about work or suddenly announces that they’ve gotten a new job.

4. Go In-Depth on Your Small Business Story

By the time your new employee starts work, he or she knows a fair amount about your company. But take a few minutes on the first day to make sure your new staff member really gets the story and the “why” of your small business. This could be as simple as talking over lunch about why you started the business and how it serves its customers.

5. Do a Welcome Activity

Get some laughs and foster bonding with a group game, task, or challenge. For example, you could divide employees into teams of two and do an office scavenger hunt. Or you could play two truths and a lie. In this game, each employee makes three statements about him or herself, and the other employees must guess which one is made up. For example, someone might say: “I have a pet wombat, I play the ukulele, and I once swam with dolphins in Hawaii.” This encourages sharing fun and interesting facts and can lead employees to discover they have things in common.

6. Give a New Employee Gift

A small present is a great and inexpensive way to make an employee feel appreciated from day one. Ideas include: a gift card to a nearby lunch spot where your team members like to eat, or a basket filled with local goodies. This is an especially nice way to welcome someone who relocated for the job.

There’s so much to do on a new employee’s first day at work. But this checklist can help you easily check all the boxes and get your new hire off to a great start!

SOURCE: Allie Johnson, Stephen Robert Morse
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