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# Onboarding checklist template


## ONBOARDING CHECKLIST FOR MANAGERS

CHECKLIST CATEGORY	MEET	STATUS	PROCESS IDENTIFICATION (If Applicable)	NOTES	STATUS RESPONSE KEY
<b>BEFORE TO START</b>					
<b>RESEARCH &amp; INFO GATHERING</b>					
Call to confirm start date and time, location, and contact person		COMPLETE			
Convey transportation parking info		IN PROGRESS			
Review dress code		HOLD			
Email link to company / department onboarding webpage		ALERT			
Discuss relocation		N/A			
<b>FIRST DAY ACTION PLAN / WELCOME PACKET</b>					
<b>CONDUCTOR'S DUTY</b>					
Colleague Notification: New hire start date, time, location, etc.					
Designate coworker to serve as a resource for new hire					
Plan handoff					
Arrange necessary meetings					
<b>HUMAN RESOURCES</b>					
<b>WORK STATION / AREA</b>					
<b>TECHNOLOGY / ACCESS</b>					
Technology: Laptop, Computer					
Email in new hire HR landing website, meeting, etc.					
Schedule any pertinent training sessions					
<b>DAY ONE</b>					
<b>DEPARTMENT ORIENTATION</b>					
Provide orientation and guide to work station / office					
Deliver and review prepared Welcome Packet					
Discuss break / meal policies					
Discuss contract / offer letter / if applicable					
Introduce to designated coworker resource					
Confirm receipt and functionality of passkey					
<b>HUMAN RESOURCES ONBOARDING</b>					
<b>APPROPRIATE TOURS</b>					
<b>PERTINENT INTRODUCTIONS / TASKS</b>					
<b>FIRST WEEK</b>					
<b>CONDUCTOR'S DUTY</b>					
Ask new hire week work, assist with any questions					
Review training schedule					
Review of technology functionality					
Discuss company culture and work style					
Discuss current projects and critical programs					
Review company mission statement, vision, and policies					
<b>ADDITIONAL FIRST WEEK TASKS</b>					
<b>FIRST MONTH</b>					
<b>FIRST THREE MONTHS</b>					
<b>FIRST SIX MONTHS</b>					
<b>ONGOING / REVIEW</b>					

Onboarding Checklist - Managers +

## IT Onboarding Checklist for New Hires

<b>Employee Name:</b>			
<b>Employee ID:</b>			
a - service is automatically provided			
f - service must be requested by the Admin Assistant or Supervisor			
e - service must be requested by the Employee			
<b>Service</b>		<b>Need</b>	<b>Status</b>
McGill ID number & PIN	a		
McGill Username/ password	a		
ID card	e		
ID card access (Level)	f		
<b>Email</b>			
Exchange mailbox	f		
Evault mail archiving & Anti-Spam system	a		
Evault mail archiving & Anti-Spam system	a		
Email setup & best practices	e		
<b>Computer &amp; File Access</b>			



ONBOARDING  
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**JOB AID: NEW HIRE CHECKLIST**

Employee's Full Name: \_\_\_\_\_

Department: \_\_\_\_\_

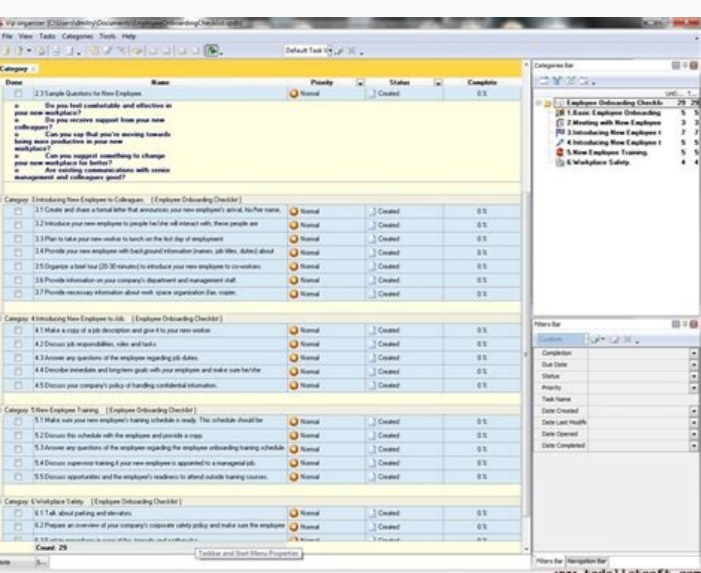
Department Contact: \_\_\_\_\_

Phone: \_\_\_\_\_

Date of Hire: \_\_\_\_\_

Item	RESPONSIBILITY	COMPLETE (%)
<b>Via Telephone with New Employee (Prior to first day of employment)</b>		
Confirm first day/work hours		
Discuss appearance expectations (for example, business casual)		
Discuss payroll frequency		
Discuss meeting with HR about I-9		
Emphasize the importance of benefits orientation session		
<b>Department Arrangements (Prior to first day of employment)</b>		
Introduce new employees by e-mail or letter		
Select current employees to assist new employee; inform current employee of expectations		
Assign first day/first week checklist activities to appropriate staff		
Designate workspace and necessary office equipment, supplies, and keychain cards		
<b>First Day/First Week</b>		
Supervisor to greet new employee at start of first day		
Introduce new employee to current employee assigned to assist with dept. orientation		
Accompany new employee to their work space		
Review computer set-up, log on, e-mail, data security		
Review phone number and phone system training, phone mail as applicable		
Discuss/distribute office supplies		

Onboarding Website: <http://www.mcgill.ca/humanresources>



Getting Prepared - Before You Start	Yes	No	Required
Register for Your IT Account, Email and ID	<input type="checkbox"/>	<input type="checkbox"/>	
Complete your Onboarding Information	<input type="checkbox"/>	<input type="checkbox"/>	
Meeting to discuss vehicle <a href="http://www.mcgill.ca/transportation/vehicles.html">http://www.mcgill.ca/transportation/vehicles.html</a>	<input type="checkbox"/>	<input type="checkbox"/>	
Apply for Parking Permit if applicable	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Human Resources and Payroll</b>			
Sign in to complete the following items:			
• New Hire Self-Service Form	<input type="checkbox"/>	<input type="checkbox"/>	
• Health Services Self-Service Form	<input type="checkbox"/>	<input type="checkbox"/>	
• Pension Plan (SAPV) Declaration of Beneficiary Payout Form	<input type="checkbox"/>	<input type="checkbox"/>	
Complete Personal Tax Credit Form (T1 & T2244)	<input type="checkbox"/>	<input type="checkbox"/>	
Review Social Security Information	<input type="checkbox"/>	<input type="checkbox"/>	
Review/Signify Acknowledgement	<input type="checkbox"/>	<input type="checkbox"/>	
<b>Getting on the Same Page</b>			
Read University's Strategic Plan, Structure and Governance	<input type="checkbox"/>	<input type="checkbox"/>	
Introduction to Academic Environment	<input type="checkbox"/>	<input type="checkbox"/>	
Review the University Policies	<input type="checkbox"/>	<input type="checkbox"/>	

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Each level is an important aspect of helping employees to assimilate and become effective contributors within an organization. The integrated process will vary depending on the role of the function and the size and needs of a business. A ç à è "Download the informal model of the offer letter in Word, this model provides the format for an informal

