

New Employee Onboarding First Year Checklist for Hiring Managers

This checklist provides a list of items, topics for review and resources new employees may need. The new employee and hiring manager (or assignee) are to schedule these discussions and activities in advance to ensure completion during the first year of employment.

New Employee's Name: _____ Start Date: _____

Hiring Manager's Pre-boarding Activities before New Employee Starts	Date Scheduled	Done ✓
Order business cards, if applicable		
Order welcome gift, if applicable		
Send welcome email to new hire		
Designate office space and furniture and order needed supplies		
Contact Telecommunications to assign telephone/number		
Arrange for computer and installation		
Request access to relevant IT applications (Outlook, Kronos, MSS, e-compass, Budget, T-System, Net Access, etc.)		
Send email to security to request parking and building access		
Complete cellular phone allowance form, if applicable		
Prepare onboarding plan		
Order uniforms, if applicable		
Send email announcement of new hire to the department and other relevant individuals		
Update organizational chart		
Assign an Ascom Phone (if applicable)		

NEW EMPLOYEE ORIENTATION

Orientation With Hiring Manager	Date Scheduled	Done ✓
Organizational & Entity Orientation		
Review BHSF vision, mission, strategic plan, FY goals, scope of services, organizational chart, etc.		
Review entity specific initiatives, strategic plan, FY goals and objectives, scope of services, organizational chart, etc.		
Conduct an entity tour		
Schedule a welcome breakfast or lunch with new hire and the team (department)		
Review entity & department's core measures data (if applicable)		
Review entity and department's patient satisfaction, physician satisfaction and employee engagement data		
Department Orientation		
Complete department orientation checklist		
Collect emergency contact information		
Meet all departmental staff		
Review job descriptions and competencies		
Review staffing and scheduling process		
Departmental policies and procedures		
Department safety plan		
Discuss staff meeting process and expectations		
Assign and schedule onboarding buddy		
Assign Preceptor/Clinical Educator for additional department shadowing/training (if applicable)		
Discuss PPE locations and expectations of use and safety		

NEW EMPLOYEE ORIENTATION

Job Orientation		
Review/discuss new employee's job description		
Review current department goals		
Discuss expectations on rounding on patients, staff and other areas		
Discuss employee performance evaluation process and expectations		
Validate IT access and confirm departmental system access		
Confirm badge access		
Discuss IDP Process with your new employee		
Schedule 30-60-90 day retention meetings		
Schedule recurring 1:1 meetings		
Arrange for job shadowing with at least one peer		