Two weeks prior to start date

Depending on the size of your organization, the following tasks may fall into your court or HR’s. Regardless, be sure to have this information collected *prior* to your new hire’s first day to ensure you have the required documentation and can streamline applicable benefits and payroll.

Offer letter and employment agreement

* Offer letter sent and signed (confirm start date and salary)
* Background check completed Employment agreement signed
* Drug screening passed

Employment details

* Employee contact information (address, cell, in case of emergency contact info)
* Obtain an employer identification number
* W-4 **Federal** Tax Withholding Form
* W-4 **State** Tax Withholding Forms
* Employee I-9 form complete (confirms worker’s eligibility to work in the U.S.)

Verification documents can include:

* Unexpired U.S. passport or passport card
* Unexpired temporary resident card
* Unexpired employment authorization card
* Unexpired temporary resident card
* Submit employee information to
* Equal Opportunity Data From (Only needed for companies with more than 100+ employees. This varies depending on if your company handles federal contracts.)
* Direct deposit form
* Employee benefits enrollment forms
* Employee handbook review
* Policy documents handled (i.e. NDA or non-compete)

One week prior to start date

Even though your hire hasn’t officially started, the week prior to their start date represents a critical prep time. This is when you’ll build your schedule, begin building rapport and communication with their future colleagues, and provision the tools they’ll need to have a fast and lasting impact.

Set a meeting schedule

* [New hire training or onboarding](https://www.zenefits.com/blog/cta/onboarding-definitive-guide/?wp-cta-variation-id=0)
* Check-ins with your broader team to get introduced and connect on joint initiatives
* Check-ins with leadership to touch base and say welcome

Provision required tools and equipment

* Computer and equipment (keyboard, mouse, monitor if applicable)
* Email account set up
* Order Divvy Card
* Set up Cell Phone Allowance
* Add to appropriate email alias groups
* [Add to company calendar and relevant recurring meetings](https://www.zenefits.com/blog/employee-onboarding-tips/)
* Badge/Hurricane Placecard for building and office access
* Grant access to tools and systems (passcodes and/or accounts)
	+ Yardi Login
	+ Netchex
	+ Corelogic (if applicable)
	+ Hunter Warfield (if applicable)
* Update Company Contact Phone
* Order Business Cards

Send new hire welcome email

* Prepare and send new hire welcome email
	+ Date and time of arrival
	+ What to bring
	+ Parking and building access
	+ Who to ask for upon arrival
	+ Dress code or appropriate attire
	+ Office map and directions for how to enter your office
	+ Attach employee handbook

First day checklist

A first day on the job is like any other first meeting – *first impressions matter!* By taking the time to go through the following, you’ll lay a strong foundation for a great chapter with your team. Be friendly, organized, and efficient in your schedule – get started with the below.

* [Clean and set up desk or work space](https://www.zenefits.com/blog/employees-first-day-onboarding-ideas/)
* Introduce your team
* Host your first check-in to go over:
* The week’s agenda
* Their role and key responsibilities
* Typical expectations about work hours, procedures for overtime, use of [flexible work policies](https://www.zenefits.com/blog/7-types-flexible-work-arrangements/), [vacation](https://www.zenefits.com/blog/paid-time-off-policies-smbs/) and [sick leave](https://www.zenefits.com/blog/supplemental-payroll-examples/rawpixel-577480-unsplash/)
* Take an office tour and highlight:
* Fire exits
* Fire extinguisher
* Bathrooms
* Smoking areas or smoking restrictions (if applicable)
* First aid areas
* Other locations as they relate to safety procedures

Technology

* Review how to operate telephone systems & set up new voicemail
* Set up company Email on Cell phone
* Add to Facebook page (if applicable)
* Note who to contact for repairs or IT support
* Arrange training dates for any new or unfamiliar technologies
* Give access codes (if applicable)
	+ Yardi
	+ Netchex
	+ Corelogic (if applicable)
	+ Hunter Warfield (if applicable)
* Schedule 30-Day check-in session

First week checklist

Use the first week to ensure the proper policies and procedures are learned and absorbed, and to check in that your new hire is getting introduced to the culture and the tools they need.

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Introduce company culture

* [Assign a buddy](https://www.zenefits.com/blog/5-actionable-ways-build-great-work-relationships-improve-company-culture/)
* Coordinate a welcome lunch
* Review organizational and reporting structure
* [Explain dress code](https://www.zenefits.com/blog/employee-handbook-examples/)
* Review social media policy (if applicable)
* Create a list of who’s who so your new hire knows who they’ll be working with

Training & Operations

* Safety training
* Sexual harassment training
* Workers Comp Procedure
* Emergency Call Out Training
* Hurricane/Severe Weather Events Training
* OSHA compliance training (if applicable)
* [Review of employee handbook and guidelines](https://www.zenefits.com/blog/5-ways-increase-employee-happiness/)
* Review of expense policy
* Review of HR point of contact and how to:
	+ Request support
	+ File a complaint
	+ Navigate employee concerns
* Familiarity and comfort with role expectations and responsibilities
* Familiarity with navigating company software, time and attendance procedures

First 30 days check-in

After a month, you and your new employee will have a better grasp on the workplace and working relationships. This is an important time to check in and review assignment completion, any blockers and needs for both employer and employee.

* [Review and record what’s working well](https://www.zenefits.com/blog/increase-effective-communication-workplace/)
* Review and record what’s not working well or needs attention
* Review performance with day-to-day systems and address any concerns
* Ensure employee has all necessary equipment, tools or resources required
* Examine first project or work product
* Solicit feedback from relevant managers and colleagues
* Solicit feedback on their onboarding experience and what went well and what could use more attention (and use for future onboarding!)
* [Schedule 90 day check-in meeting](https://www.zenefits.com/blog/improve-management-game-increase-employee-retention/)

First 90 days check-in

At this point, creating routine meetings to touch base on employee performance and contentment on the job are critical to retention. Give feedback on how your new hire has been performing and address the following:

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Employee work performance

* + [Are tasks completed on time?](https://www.zenefits.com/blog/top-7-tips-to-increase-employee-productivity/)
	+ Are tasks of quality?

What needs improvement

* + Consider feedback from other employees and peers
	+ Consider areas of opportunity to help enhance the employee’s performance

What’s going well

* + Tease out a project that they’ve contributed to and highlight their success
	+ Deliver positive feedback you’ve heard from others
	+ Ask what they’ve enjoyed working on and weave it into their next 90 days

A look at the next 90 days

* + What does the employee need to be aware of in the coming weeks and months?
	+ Set Goals
	+ Plan for deadlines, initiatives and imminent changes