**King County  
Onboarding Checklist for Managers**

****

Onboarding is a process in which new employees are integrated into the work place and given the tools and knowledge they need to become successful and productive at their new job. For this purpose, we consider onboarding to be from the time of hire to 90 days on the job, though you may include additional milestones such as probation end time, 6 month evaluation or annual evaluation.

|  |  |  |  |
| --- | --- | --- | --- |
| **New Employee Information** | | **Date Completed** | |
| Name: | |  | |
| Position: | |  | |
| Start Date: | |  | |
| Manager: | |  | |
| 3 Month evaluation date: | Probation end date: | | 6 Month evaluation date: |

**Notes:**

|  |  |  |
| --- | --- | --- |
| **Pre-Arrival** | | **Date Completed** |
| Technology | |  |
|  | Enter employee as hired in PeopleSoft. This requires SS #. You can ask for this over the phone and confirm on Day One. Don’t ask for this in email. |  |
|  | Request computer, login info, email account |  |
|  | Request phone and phone number |  |
|  | Ensure all necessary software, systems and tools are set up (printers, scanners, zz groups/email lists, shared files, SharePoint) |  |
|  |  |  |
| Location | |  |
|  | Make sure desk/ work area is clean and welcoming |  |
|  | Request work order from facilities for anything that needs changing |  |
|  | Ensure basic office supplies/work materials are provided |  |
|  |  |  |
| Communication | |  |
|  | Send out new employee announcement email, send copy to new employee |  |
|  | Send employee information about what to expect on day one – public transportation options or where to park, dress code, lunch information, etc |  |
| Management | |  |
|  | Complete New Employee Onboarding Plan |  |
|  | Schedule time for onboarding in your calendar and on new employees’ calendar if possible |  |
|  | Schedule required trainings including New Employee Orientation |  |
|  | Assign a “buddy”; confirm with “buddy” roles and expectations |  |
|  | Add employee to regularly scheduled team meetings |  |
|  | Order business cards and name plate if required |  |
|  | |  |
| Other: | |  |
|  | |  |
|  | |  |
|  | |  |
|  | |  |
|  | |  |
|  | |  |
|  | |  |
|  | |  |

|  |  |  |
| --- | --- | --- |
| **First Day** | | **Date Completed** |
| HR Meeting: | |  |
|  | Complete personnel forms |  |
|  | Review New Employee Packet |  |
|  | Get ID badge/Orca card - Discuss commute: orca card usage, reporting lost card, guaranteed ride home program |  |
|  | Deliver to manager |  |
|  | |  |
| Ensure these items are addressed by HR or Manager | |  |
|  | Emergency contact information collected for PeopleSoft |  |
|  | Workgroup’s role in emergency response |  |
|  | Telecommute policy |  |
|  | Shared resources for activity – bike storage areas, locker rooms, showers, activity center |  |
|  | |  |
| Manager meeting | |  |
|  | Provide a schedule for first week |  |
|  | Confirm hours and days of work, lunch period and breaks |  |
|  | Go over Department and Division organization chart |  |
|  | Discuss Lean culture and section goals |  |
|  | Provide New Employee Onboarding Plan |  |
|  | Discuss check in schedule – weekly with manager, reviews at 30,60 and 90 days |  |
|  | Workplace specific policies (ie scent free, personal cell phone use, other) |  |
|  | Review of safety procedures, emergency preparedness, evacuation, meeting location |  |
|  | |  |
| Arrange for lunch with employee – Manager, buddy or work team – hosted or brown bag | |  |
| Provide time for the employee to review the New Employee Packet | |  |
| Use of computer (login) and telephone: setup, voicemail | |  |
| Other: | |  |
|  | |  |
|  | |  |
|  | |  |
|  | |  |
|  | |  |
|  | |  |
|  | |  |

|  |  |
| --- | --- |
| **First Day - Tour of Facility** | **Date Completed** |
| Location of supplies and equipment |  |
| Identification of other relevant work areas |  |
| Location and familiarity with photocopier / fax / scanner |  |
| Lunchroom location / Kitchen procedures (discuss policy on eating at desk) |  |
| Bathroom location (including gender neutral) |  |
| Introduction to employees |  |
| Where to keep personal items |  |
| Location of first aid supplies |  |
| Activity Center and bike storage/shower facilities, if available |  |
| Coffee shop, if available |  |
| Information about resources within walking distance (meal locations, etc) |  |
|  |  |
|  |  |

|  |  |
| --- | --- |
| **First Week** | **Date Completed** |
| New Employee Orientation |  |
| Review training opportunities and/or mandatory training |  |
| Review performance expectations & probation period |  |
| Review performance evaluation system |  |
| Workplace expectations |  |
| Opportunities for advancement |  |
| Policies and procedures manual |  |
| Union procedures & copy of contract |  |
| Introduce the Equity & Social Justice vision |  |
| Review any questions on New Employee Packet/Division specific info |  |
| Paycheck: when, how, where and payroll periods |  |
| How to complete time entry |  |
| Reporting absences and tardiness – policy on reporting and how to complete in PeopleSoft |  |
| Overtime procedures and requests |  |
| Vacation procedures and requests |  |
| Holidays |  |
| Fleet car registration and process, if applicable |  |
| Assist with setting up email signature |  |
| Schedule recurring one-on-one meeting with manager |  |
| Have employee shadow to relevant meetings |  |
|  |  |
| Other: |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
| **First Month – 90 days** | **Date Completed** |
| Continue one-on-one meetings |  |
| Provide timely, meaningful job feedback |  |
| Continue contact with “buddy” – maybe once a week check ins |  |
| Follow up on required training – is it getting completed, are there questions |  |
| Regularly review New Employee Onboarding plan and task assignments. Discuss progress, challenges, road blocks |  |
| Continue introducing employee to colleagues, external contacts etc |  |
| Schedule end of probation period review, if required |  |
| Ensure time is being properly recorded in PeopleSoft |  |
| Assign new tasks as appropriate, including them in regular check in meetings for follow up |  |
| Include additional training, as required. Consider SharePoint, eLearning, lean, ESJ, records management |  |
| Schedule coffee with Section, Department, Division leadership, if appropriate to welcome and check in |  |
|  |  |
|  |  |
| Other: |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |

|  |  |
| --- | --- |
| **Optional Ideas** | **Date Completed** |
| Provide a welcome card signed by your team with a gift card to one of the building's coffee shops |  |
| Take the employee out to lunch on their first day |  |
| Ask about any dietary restrictions if your group often eats together |  |
| Write a welcoming message on the team’s whiteboard |  |
| Encourage the team to welcome the new employee |  |
| Decorate their cubicle/office |  |
| Other: |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |
|  |  |