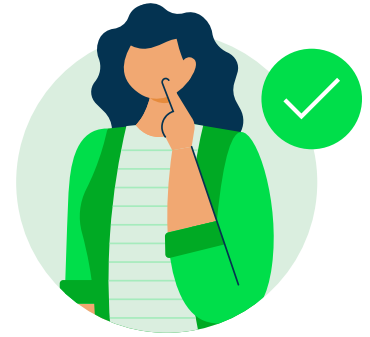


Onboarding checklist for new hires



A positive onboarding experience can inspire confidence in new hires and increase their engagement and longevity with the company. Use this checklist to help guarantee you never miss a beat.

1+ month prior to start: Ensure materials are up to date

Clearly outline company policies in a comprehensive employee handbook.

Settle on a PTO policy and share it with new employees ASAP.

Pick a healthcare plan or set of options for your new hires. Make signing up fast and easy.

Make payment schedules and other financial information easy to access.

Share additional financial opportunities like retirement benefits, employee stock purchase plans, and reimbursement benefits.

2-4 weeks prior to start: Send and file new hire paperwork

Collect their emergency contact information.

Ensure all parts of your payroll systems are set up.

Get their banking information to set up direct deposit.

Send them an I-9, W-4, or other relevant tax forms.

Collect their benefits enrollment information.

1 week prior to start: Schedule first-day emails and alert teams

Set up the employee's accounts, computer logins, and other technical requirements.

Send a welcome email with details about their first day, including where to park and what to bring.

Provide their uniform or share your company dress code.

Copy any keys or issue any badges they'll need to access the workplace.

Prepare their workstation with necessary office equipment, an employee handbook, a first-day agenda, and a welcome gift.

Announce the new hire to the rest of your staff. Include the new employee's name, position, responsibilities, and start date.

First day: Welcome the new hire

Greet them when they arrive and escort them to their desk.

Introduce them to their new team. Consider scheduling a team lunch or activity to facilitate meaningful connections.

Conduct a tour of your facility or workplace. Don't forget to point out the restrooms and common areas.

Schedule some time for them to meet with HR to complete any remaining paperwork.

Host a new employee orientation to discuss your company's mission, vision, and goals.

Share essential information about your products, services, and customers.

Schedule dedicated time for them to review the employee handbook. Discuss company policies and procedures.

Conduct an end-of-day check-in. Answer any questions, make sure they have everything they need, and let them know what to expect next time.

First week: Support and reinforce

Begin role-specific training and consider giving them small role-related tasks to help ease them in.

Set them up with a mentor or someone they can shadow or turn to with questions.

Schedule team lunches or activities with different groups each day. This encourages more one-on-one conversations and tighter connections.

Continue discussing company policies and procedures, culture, and goals.

Connect with them at the end of each day. Answer any questions they might have, gather feedback, and share expectations.

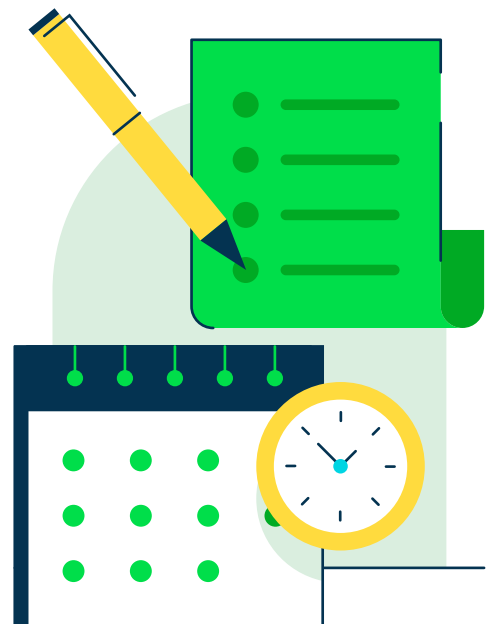
First month: Train and get acquainted

Schedule a check-in with HR. Your employee may have questions about PTO, health care, or other benefits now that they've had some time to acclimate.

Continue with role-specific training and job shadowing. Branch out and schedule job shadowing with employees on different teams and roles to give your employee a full picture of company operations.

Schedule one-on-one time with your employee to discuss expectations, responsibilities, and more. Then set up a monthly, quarterly, and annual review process.

Ask new hires what they liked about their onboarding experience and what could have been better. This is your opportunity to improve.



3 months post-start: Transitions and feedback

Schedule one-on-one conversations to discuss their progress, goals, challenges, and feedback. These conversations can be with you, the HR team, or another manager.

Gather even more feedback. Find out what you could have done better and answer any remaining questions.

Schedule a team activity and do something fun! Team connections are critical for productivity and collaboration. The more you create opportunities to connect and engage as a team, the better.

6 months post-start: Check-in and review

Complete monthly, quarterly, and yearly check-ins or reviews with all employees. Employees should always understand their roles, responsibilities, and expectations.

Review company policies and procedures with your entire team on an ongoing basis. Keep your employee handbook up to date, or show them how to use the employee portal to find the information they want.

Schedule monthly or quarterly team activities to keep company culture and team camaraderie strong.



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