Onboarding Checklist

This resource is part of the State Flex Program Staff Sustainability Guide and Toolkit.

This checklist is designed to help you plan and carry out an engaging and welcoming onboarding experience. Customize this checklist to ensure it aligns with your organization's onboarding process and meets the unique needs of each new hire.

Employee:

Preboarding

Activities that take place before the first day on the job

☐ Email the employee welcoming them to the team, sharing the itinerary for the first few days, and any additional information they need to get off to a good start (parking details, meeting location, etc.)

☐ Appoint an "onboarding buddy" and ask them to send a welcome email as well

☐ Send a welcome package to the new employee's home

☐ Prepare a welcoming workspace

☐ Inform other staff of the new hire's start date and ask them to welcome them during the first week on the job

☐ Arrange for all needed equipment and technology to be available on the employee's first day

☐ Develop a backup plan: An agenda for the employee's first day in the event that technology and equipment is not ready

☐ Gather all the documents the new employee needs to fill out on their first day

☐ Create a learning plan for the employee's first 30, 60, and 90 days

Orientation

Helping the employee settle in and get acclimated

☐ Arrange for participation in the organization's formal orientation program

☐ Assist with completion of paperwork as needed

☐ Provide an in-person or virtual office tour

☐ Review job responsibilities in detail as well as the big picture

☐ Share information about workplace norms and culture

☐ Assign a few small tasks

☐ Break learning into manageable chunks by incorporating time for individual work and reflection into the workday

☐ Arrange onboarding buddy meetings

☐ Schedule daily check-ins during the first few weeks

☐ Schedule a meet-and-greet (virtual or in-person) with other department and/or office staff

Integration

Building comfort and confidence with the job and the culture

☐ Broaden the employee's view of the organization and the rural health system by helping them learn about other related programs

☐ Get the employee involved in their own development by asking them what knowledge, skills or resources would most help them in their role and their career goals

☐ Celebrate at least one milestone (such as the employee's six-month anniversary, first onsite visit to a hospital or clinic, or the successful completion of their first big project)

☐ Arrange for attendance at a Flex Program Workshop

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