

# HIRING MANAGER ON-BOARDING CHECKLIST

[Sheet 1]

## Before First Day (Pre-Board)

Employee Name: \_\_\_\_\_

Position Title, Series, Band: \_\_\_\_\_

Entry-on-duty Date: \_\_\_\_\_

- Prepare for on-boarding an employee by having a binder or electronic resources with the following up-to-date information:
  - Organizational charts
  - Job Descriptions and performance plans
  - Work area maps
  - Agency mission, vision and goals
  - Area newsletters and websites
  - Other office specific material
- Extend personal welcome to employee and communicate first-day logistics via phone call or email.
- Send an organizational Welcome Packet, which should include a welcome letter and organizational information.
- Remind employee to bring appropriate documentation as indicated during EODonline session.
- Ensure that work space essentials and reasonable accommodations are ready.
- Request computer and network access with IT, as necessary.
- Announce pending arrival of new employee to staff and stakeholders.
- Collaborate with the staff and assign a sponsor/mentor who will dedicate the time to provide important support to the new employee.
- Plan initial work assignments for the new employee for the first week.
- Assist with temporary lodging and transportation to be available upon arrival, if applicable.

## Additional Pre-board Options for Enhancing the New Employee's On-boarding Experience

- Check office leadership calendar and set up appointment to meet with the newcomer within first 2-3 weeks.
- Have a "Welcome to..." Greeting Sheet and team members write a welcoming message to the employee. Post it in the new employee's work area.
- Schedule an all-hands meeting for the first day so that all team members can introduce themselves to the new employee.

**[Sheet 2]**

**First Day of Work**

**Welcome**

Employee Name: \_\_\_\_\_

Position Title, Series, Band: \_\_\_\_\_

Entry-on-duty Date: \_\_\_\_\_

**Key Tasks**

**Initial Orientation**

- Ensure completion of initial in-processing.
- Ensure that access to systems has been requested for the employee.
- Share the mission and values of the organization.
- Provide necessary information, handbooks or guides – including workplace norms (e.g., leave, lunchtime, breaks, dress code, etc.).
- Provide on-boarding binder or electronic resources that include organizational charts and contact lists.
- Have co-workers meet new employee.
- Give a tour of the building, the office and essential facilities.
- Allow some time for the new employee to settle into the office; check in with him or her frequently.
- Check in with the employee at the end of the day. Discuss the first-day experience with the new employee and answer questions.

**Site Orientation** — This may include a walking tour, handouts or access to online information about the local area and its activities, your building and its facilities, local professional organizations, parking policies, dress code, transportation and food options, etc. If possible, complete a tour of the site facilities to locate offices and areas of the facility. Discuss:

- Parking
- Designated smoking areas
- Personal storage
- Cafeteria, break Facilities, refrigerator
- Restroom locations and restroom key/codes, if applicable
- Map of the surrounding area including public transit, restaurants, pharmacy, etc.

**Safety Orientation** — This should be provided to new hires as soon as possible; explain safety policies specific to your organization and discuss:

- Hazard reporting
- Accident reporting
- Evacuation procedures
- First aid

**Security Orientation** — This will ensure that all new hires understand the organization's security structure and security procedures. Discuss:

- Building access
- Keys, codes, ID cards
- Safeguarding personal belongings
- Security procedures
- Safeguarding Sensitive Security Information and Personally Identifiable Information

### **Additional Options for Enhancing the New Employee's On-boarding Experience**

**Senior Leader Welcome** — A senior executive or representative welcomes the employee and may show a multimedia overview of the organization.

**[Sheet 3]**

**First Week**

**Creating Familiarity**

Employee Name: \_\_\_\_\_

Position Title, Series, Band: \_\_\_\_\_

Entry-on-duty Date: \_\_\_\_\_

**Key Tasks**

- Provide position description, job scope and performance expectations. Explain job responsibilities for the new employee, set realistic expectations, and provide feedback early and often using clear methods for understanding performance objectives.
- Establish a formal performance plan and communicate that you will hold the employee accountable for achieving the goals articulated in the plan.
- Provide meaningful work for the new employee
- Discuss key contacts and required business processes.
- Provide extended tours and introductions.
- Familiarize employee with key stakeholders and senior leaders.
- Provide initial work assignments – either training or substantive work – and ensure the assignments are understood.
- Discuss essential and developmental training opportunities.
- Ensure that systems access has been provided and accounts established, as needed, for the new employee.

**Additional Options for Enhancing the New Employee’s On-boarding Experience**

- Agency Orientation:** New employees learn about the history and mission of the organization, its customers, expectations, culture, development opportunities and employee recognition. This generally occurs over a 30-day period.

**[Sheet 4]**

**First 90 Days**

**Acculturation**

Employee Name: \_\_\_\_\_

Position Title, Series, Band: \_\_\_\_\_

Entry-on-duty Date: \_\_\_\_\_

**Key Tasks**

- Block out time especially during the first eight weeks to meet with your new employee, answer his or her questions, and respond to his or her concerns.
- Initiate Individual Development Plan.
- Provide training essential to job performance.
- Monitor performance and provide feedback.
- Seek feedback from employee on his or her initial experiences.
- Have employee meet with stakeholders, including staff from other offices and external partners.
- Assist employee with understanding TSA and organizational culture.
- Identify and provide opportunities to participate in organizational activities.

**Additional Options for Enhancing the New Employee's On-boarding Experience**

- Job Orientation:** This is an ongoing phase focused on enabling employees – new, seasoned or transferred – to understand the job, their role on the team, and how their work contributes to the mission of the agency or organization. Since this phase is ever-evolving with the changes that impact the agency, managers are reminded to remain vigilant in keeping the team apprised of changes that affect the team's ability to complete the mission.

**[Sheet 5]**

**First 6 Months**

**Continual Development**

Employee Name: \_\_\_\_\_

Position Title, Series, Band: \_\_\_\_\_

Entry-on-duty Date: \_\_\_\_\_

**Key Tasks**

- Recognize positive employee contributions.
- Provide formal and informal feedback on performance.
- Finalize initial Individual Development Plan.
- Promote participation in webinars, training, conferences, “lunch and learn” activities and other outreach/developmental activities, etc.
- Meet regularly with the employee to answer questions, recommend training activities, review policies and procedures and discuss any employee concerns.

**[Sheet 6]**

**Supply Checklist**

- Stapler
- Staples
- Staple Remover
- Tape
- Tape Dispenser
- Pens
- Pencils
- Highlighters
- Post-It Pads
- Notebooks
- Calendar
- Writing Pad
- Paper Clips
- Binder Clips
- Ruler
- Inbox
- Scissors
- Trash Can
- Chair
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_
- Other: \_\_\_\_\_