

ONBOARDING CHECKLIST

This checklist identifies key stages in the onboarding of a new employee - with blank actions on page 4 to record any company specific actions. Print off and store in employee records to help track each step of the onboarding process.

Important Note: seek advice before using for casual staff or by State System employers

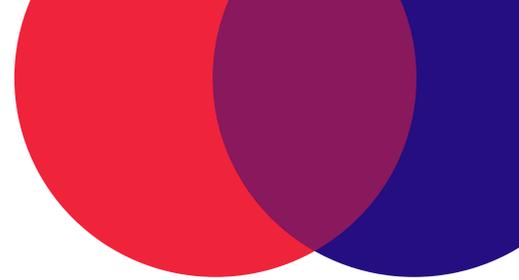
Employee Name.....

COMPLIANCE

DUE	ACTION	RESPONSIBLE	DATE COMPLETE
-14 days	Contracts: Prepare and send employment contracts	Manager	<input type="text"/>
-14 days	Contracts: issue key policies (and Fair Work Information if required)	Manager	<input type="text"/>
-14 days	Contracts: issue Tax Declaration and Superannuation Choice forms	Manager	<input type="text"/>
-7 days	Records: confirm Australian working rights (if necessary)	Manager	<input type="text"/>
-3 days	Records: enter completed paperwork into Company systems such as payroll	Administration	<input type="text"/>
-3 days	Records: enter end of probation (or casual conversion) date to records	HR	<input type="text"/>
-3 days	Induction: confirm new employee is booked for internal induction	HR	<input type="text"/>

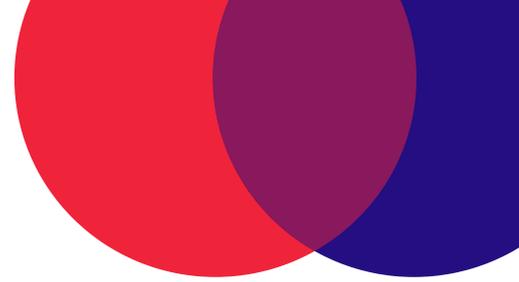
OFFICE LOGISTICS

DUE	ACTION	RESPONSIBLE	DATE COMPLETE
-3 days	Culture: diarise to take employee to lunch (or have lunch with in workplace)	Manager	<input type="text"/>
-3 days	Culture: diarise meeting to introduce to senior management	Manager	<input type="text"/>



OFFICE LOGISTICS

DUE	ACTION	RESPONSIBLE	DATE COMPLETE
-3 days	Culture: assign a 'work buddy' to help new employee for the first few weeks	Manager	<input type="text"/>
-3 days	Culture: issue internal email to notify team of the new employee's arrival	Manager	<input type="text"/>
-3 days	Logistics: confirm start date and arrival details with new employee	Manager	<input type="text"/>
-3 days	Logistics: confirm any special access requirements or equipment	Manager	<input type="text"/>
-1 days	Logistics: set up desk and any welcome packs/messages	Administration	<input type="text"/>
-1 days	Logistics: set up email and web access- note links, passwords and instructions	Administration	<input type="text"/>
-1 days	Logistics: add employee to internal distribution / phone lists and website	I.T.	<input type="text"/>
-1 days	Logistics: confirm phone / web access is connected. Email (internally) to employee	I.T.	<input type="text"/>
-1 days	Logistics: email leave policy and instructions on applying for leave	Manager	<input type="text"/>
-1 days	Logistics: confirm employee is booked for induction and training	Manager	<input type="text"/>
-1 days	Culture: issue internal email to remind team of new employees arrival	Manager	<input type="text"/>
0 days	Logistics: issue security keys or access cards	Administration	<input type="text"/>
0 days	Logistics: issue mobile phone or other equipment	Administration	<input type="text"/>

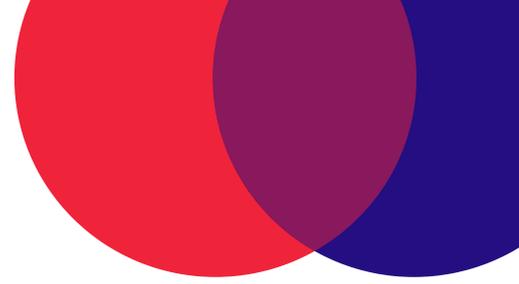


INDUCTION

DUE	ACTION	RESPONSIBLE	DATE COMPLETE
0 days	Induction: employee undertakes company induction	Manager	<input type="text"/>
0 days	Induction: employee signs attendance of and understanding of induction	Manager	<input type="text"/>
0 days	Induction: employee given orientation of workplace and emergency response	Manager	<input type="text"/>
0 days	Induction: employee issued with Staff Manual / policies	Manager	<input type="text"/>
0 days	Induction: employee issued with any personal protective equipment	Manager	<input type="text"/>

MANAGEMENT

DUE	ACTION	RESPONSIBLE	DATE COMPLETE
0 days	Team: introduce employee to immediate team and other related stakeholders	Manager	<input type="text"/>
0 days	Management: introduce employee to next up Manager	Manager	<input type="text"/>
0 days	Company: identify key dates in calendar, history and services of company	Manager	<input type="text"/>
0 days	Company: identify organisation structure and reporting lines	Manager	<input type="text"/>
0 days	Role: go through and agree job description - sign and accept	Manager	<input type="text"/>
0 days	Role: Identify key processes and tools in employee's role	Manager	<input type="text"/>
0 days	Role: where relevant, explain the performance appraisal process	Manager	<input type="text"/>
0 days	Role: outline manager's expectation of employee (KPIs & behaviours)	Manager	<input type="text"/>



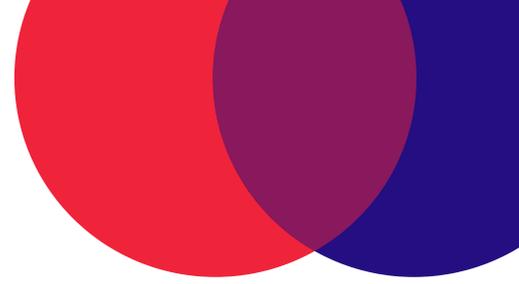
DUE	ACTION	RESPONSIBLE	DATE COMPLETE
0 days	Role: identify any skill gaps and plan training to address	Manager	<input type="text"/>

CULTURE

DUE	ACTION	RESPONSIBLE	DATE COMPLETE
0 days	Culture: explain the culture of the company and how 'best' to adapt	Manager	<input type="text"/>
0 days	Team: introduce 'buddy' and how this relationship should work	Manager	<input type="text"/>
+1 days	Team: conduct morning tea 'ceremony' - formally welcome employee	Manager	<input type="text"/>
+3 days	Clients: introduce employee to key clients (electronic or physical)	Manager	<input type="text"/>

OTHER COMPANY ACTIONS

DUE	ACTION	RESPONSIBLE	DATE COMPLETE
.....	insert:	<input type="text"/>
.....	insert:	<input type="text"/>
.....	insert:	<input type="text"/>
.....	insert:	<input type="text"/>



ONBOARDING APPROVED

I confirm the employee has been onboarded in accordance with Company policy and as per this checklist.

Manager Name.....

Manager signature.....

Date

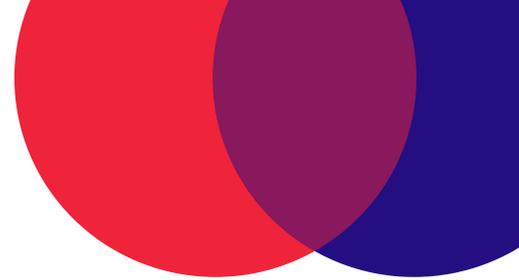
EMPLOYEE ACKNOWLEDGEMENT

I acknowledge and accept that I have undertaken onboarding in accordance with this checklist and fully understand the various requirements and obligations this places on me during my employment with the company.

Employee Name.....

Employee signature.....

Date



OFFICE USE ONLY

- *These actions are to be completed by the Manager.*
- *Employees DO NOT sign or accept.*

'POST' ONBOARDING ACTIONS

DUE	ACTION	RESPONSIBLE	DATE COMPLETE
+5 days	Role: check in with buddy that employee is settling in	Manager	<input type="text"/>
+7 days	Role: check in that employee understands duties	Manager	<input type="text"/>
+30 days	Role: conduct informal review of job performance. Record in notes	Manager	<input type="text"/>
+60 days	Role: complete end of probation check list and decide on employment	Manager	<input type="text"/>
+80 days	Role: confirm or terminate employment subject to probation review	Manager	<input type="text"/>
FILE NOTE:	Was employee probation approved? (please circle)	YES / NO	

POST ONBOARDING COMPLETE

I confirm that post onboarding activities have been completed in accordance with Company policy and as per this Post Onboarding checklist.

Manager Name.....

Manager signature.....

Date

