

# Onboarding Process Template

PRIOR TO START	FIRST DAY	FIRST WEEK	FIRST MONTH
<ul style="list-style-type: none"> <li>o Call to confirm start date and time</li> <li>o Discuss relocation</li> <li>o Discuss dress code</li> <li>o Provide link to company / department onboarding webpage</li> <li>o Build Welcome Packet</li> <li>o Confirm receipt of all recruitment paperwork and background check completion</li> <li>o Confirm Offer Letter receipt / acceptance</li> <li>o Prepare work station / area</li> <li>o Order paskey and ID</li> <li>o Order email and phone setup</li> <li>o Order any hardware, software, peripherals, etc.</li> <li>o Enroll new hire in HR briefing, orientation, etc.</li> <li>o Schedule any pertinent training sessions</li> </ul>	<ul style="list-style-type: none"> <li>o Welcome upon arrival and guide to workstation</li> <li>o Deliver and review Welcome Packet</li> <li>o Discuss break / meal policies</li> <li>o Introduce designated coworker resource</li> <li>o Confirm receipt and functionality of paskeys</li> <li>o Connect with HR to complete any further paperwork</li> <li>o Review Portal</li> <li>o Sign Offer Letter</li> <li>o Review software, hardware, technology, printers, etc.</li> <li>o Confirm email and phone setup</li> <li>o Review Technology Acceptable Use policies</li> <li>o Assist with online directory setup</li> <li>o Make further introductions</li> <li>o Conduct or schedule tours</li> </ul>	<ul style="list-style-type: none"> <li>o Ask how first week went</li> <li>o Assist with questions</li> <li>o Review training schedule</li> <li>o Review technology functionality</li> <li>o Discuss company culture and work style</li> <li>o Discuss current projects and cyclical processes</li> <li>o Review company mission statement, vision, and policies</li> </ul>	<ul style="list-style-type: none"> <li>o Assess need for weekly or bi-weekly meetings</li> <li>o Answer any questions</li> <li>o Set short and long-term goals</li> <li>o Answer any questions</li> </ul>
			<div data-bbox="1377 735 1810 845" style="background-color: #800000; color: white; padding: 5px; text-align: center;"><b>FIRST THREE MONTHS</b></div> <ul style="list-style-type: none"> <li>o Performance review</li> <li>o Review short and long-term goals</li> <li>o Answer any questions</li> </ul>

# Sample Onboarding Process Document

**J Rink**



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