

# HR Checklist For Successful Onboarding

*This HR Checklist Is For Successful Onboarding + All The Tasks Your HR Person Should Have Processed*

## Send & Complete New Hire Paperwork

Having all your new hire paperwork ready and organized before your new hire shows up for the first day will streamline your onboarding schedule and avoid missing a step that will result in you chasing them down at an inconvenient time.

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| <input type="checkbox"/> Employment Information Form | <input type="checkbox"/> Equal Opportunity Data Form |
| <input type="checkbox"/> W-4 Federal Form            | <input type="checkbox"/> Self Identification Forms   |
| <input type="checkbox"/> I-9 Federal Form            | <input type="checkbox"/> Background Check Forms      |
| <input type="checkbox"/> Direct Deposit              | <input type="checkbox"/> W-2 Forms                   |

## Prepare Their New Equipment

Make sure your new hire isn't waiting around to get started. Be as excited as they are to get going by providing a ready-to-go desk set up.

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|--|---|
| <input type="checkbox"/> Prepare the machinery or a laptop           | <input type="checkbox"/> Pre-install any software needed              |
| <input type="checkbox"/> Prepare a uniform                           | <input type="checkbox"/> Double check everything is working properly  |
| <input type="checkbox"/> Get name tags, pens and a notebook in place | <input type="checkbox"/> Have your first week of training planned out |

## Inform Them Of Company Policies

Clearly state the company policies and ensure them that if they have any questions or issues to speak with you.

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|--|--|
| <input type="checkbox"/> Leave policies (i.e. sick, disability, maternity, parental, etc...) | <input type="checkbox"/> Insurance policies          |
| <input type="checkbox"/> Break off / Time off  | <input type="checkbox"/> Cost reimbursement          |
| <input type="checkbox"/> Overtime pay  | <input type="checkbox"/> Pensions and other benefits |

## Set Job Expectations

- Number of expected work hours
- Short term goal (company and department)
- Long term goals (company and department)

## Track Progress

Start off by giving them a light load of tasks. After a week on the job follow up with them and see what they understood and didn't. Provide feedback and track their progress. (what were your goals for them and how close did they get to that goal) then repeat for at least a month.

- Number of expected work hours
- Short term goal (company and department)
- Long term goals (company and department)

***Need help completing your checklist? Schedule a free consultation today!***

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