EMPLOYEE ONBOARDING CHECKLIST

The onboarding checklist is designed to guide the onboarding journey from pre-employment preparations through the initial months, fostering a smooth integration of new employees into the organisation. It can be customised based on your organisation's specific needs, policies, and processes.

Employee well-being should be central to any onboarding process. Wellbeing is visited at regular intervals in the employee onboarding checklist; however, it should remain a priority at all times through the onboarding journey. Establishing open communication, integration to teams and culture, scheduling feedback sessions, and encouraging participation in training and development opportunities are crucial steps. By prioritising the holistic health and happiness of new hires from the start, organisations lay the foundation for a supportive and fulfilling employee experience.

TIMEFRAME	TASKS	GUIDANCE (Add any guidance relevant to your organisation)	NOTES (Add any notes on timeline, status, etc.)
Before first day	Contact employee to confirm whether there is anything that could assist their orientation to the organisation	• Reasonable adjustments • Accessibility • • •	
	Send welcome email with essential information	• Start date & time • Location • Parking • Dress code • •	
	Set up necessary digital accounts	• Email • System access and logins • Telephone • Building access • Link for virtual meet if working remotely •	

	Provide pre-employment paperwork	- Employment contract - Payroll information - Superannuation documents - Tax - Salary packaging - Work from home assessment - Personal details - Emergency contact	
	Prepare workspace	- Laptop, monitor, etc. - Phone - Desk, chair, and other equipment	
Day One: Welcome & Compliance	Greet the new employee	- Arrive before the new employee - Be prepared to greet upon their arrival (in person or virtual)	
	Tour the workspace	- Workspace - Familiarisation with the premises - Amenities and facilities - Access codes - Security protocol - Emergency procedures and first aid	
	Introductions	- Introduce team members and other key colleagues (supervisors, support staff, etc.) Consider: - Welcome and introduction email - Morning or afternoon tea - Informal introductions	

	Introduction to organisational systems	• Provide an introduction and training on relevant systems and software
		   o Storage and file management
		   o Time sheets
		   o Case management software
		   o Client databases
		   o Communication platforms
		•	

	Familiarisation with policies and procedures	• Provide copies or digital access to relevant policies and procedures
		   o Code of conduct
		   o Confidentiality
		   o Safety
		   o Reporting protocols
		   o Ethical guidelines
		   o
		   o
		• Ensure the employee is given time to read and familiarise themselves with policies and procedures
		• Provide induction training
		   o Relevant online modules
		   o	

	Onboarding paperwork	• Provide and assist with paperwork
		   o
		   o
		   o
		• Collect and review pre-employment paperwork	

	Wellbeing day one	• Check-in: establish open lines of communication and build trust and rapport
		   o Questions
		   o Concerns
		   o Adjustments	

		o Feedback	

Week One: Clarity & Inclusion	Role clarity	• Review position description in detail
		    o Responsibilities
		    o Expectations
		    o Key performance indicators
		    o
		• Explore short and long-term goals	

	Reporting requirements	• Review organisational documentation and reporting requirements
		    o Client files
		    o Progress notes
		    o Incident reports
		    o Outcome measurement
		    o
		• Ensure familiarity with and understanding of relevant frameworks and guidelines
		    o HSQF
		    o Queensland Human Rights Act
		    o NRSCH
		    o	

	Organisational structure and function	• Provide information on organisational structure
		    o Reporting lines
		    o Delegations
		    o Team / department functions
		    o
		    o
		• Review organisational mission, vision, and values and relationship to the employee's role	

	Mentorship	• Assign a mentor during the early weeks on the job to:
		    o Observe and learn from
		    o Answer questions
		    o Impart organisational knowledge
		    o Perform introductions
		    o	

	Wellbeing week one	• Check-in: strengthen lines of communication and build trust and rapport
		   o Questions
		   o Concerns
		   o Adjustments
		   o Feedback	

**Weeks Two-Three:
Culture &
Inclusion**
	Organisational culture	• Provide insights into the organisational history and evolution of the organisation
		   o Key milestones
		   o Challenges
		   o Goals
		   o Strategy
		   o
		• Provide insight into organisational culture
		   o Traditions
		   o Shared language
		   o Agreed ways of working
		   o
		• Encourage and support participation in team meetings and events
		   o
		   o	

	Continued learning	• Explore professional development and training opportunities
		   o Diversity, equity, and inclusion
		   o Cultural competence
		   o Other areas of interest
		   o Areas for development
		   o	

	Wellbeing weeks two and three	• Check-in
		   o Questions
		   o Concerns
		   o Adjustments
		   o Feedback	

Week Four: Evaluate	Progression	• Conduct a formal check-in meeting to assess progress
		  o Role clarity
		  o Attainment and progress toward goals
		  o Integration with team
		  o Familiarity with broader workplace
		  o
		• Schedule check-ins at regular intervals
		• Gather feedback on the induction process	

	Wellbeing week four	• Check-in
		  o Questions
		  o Concerns
		  o Adjustments
		  o Feedback	

Week Five & Beyond: Continued Growth & Integration	Continued growth and integration	• Continue providing opportunities for skill development • Encourage participation in team-building activities • Foster ongoing connections with colleagues and teams • Support ongoing career development • •	
	Wellbeing week five and beyond	• Maintain open line of communication for questions and concerns • Continue regular check-ins sessions to ensure employee wellbeing • Encourage ongoing participation in training sessions • Explore professional development opportunities • Monitor progress and offer support as needed • Consider individual style and needs	