Hiring and Job Acceptance Checklist

Creating a comprehensive job acceptance checklist for HR can help ensure a smooth and efficient onboarding process for new hires.

Here's a detailed checklist you can use:

Pre-Employment

1. **Offer Letter**
   - Send the offer letter with job details, compensation, and start date.
   - Ensure the candidate signs and returns the offer letter.
2. **Background Checks**
   - Conduct necessary background checks (criminal, employment history, education verification).
3. **Reference Checks**
   - Contact provided references and document feedback.

Documentation

4. **Employment Forms**
   - Collect signed job acceptance letter.
   - Gather completed I-9 and W-4 forms.
   - Obtain direct deposit information.
   - Ensure completion of non-disclosure agreements (NDAs) and non-compete agreements if applicable.
5. **Company Policies**
   - Provide the employee handbook and obtain acknowledgment of receipt.
   - Share company policies on attendance, dress code, and code of conduct.

Onboarding Milestone: Setting the Stage

Communication:

Provide information to the employee before their first date of work via phone, email, etc.

- When to arrive (date and time)
- Where to park
- Where to report
- Who to ask for upon arrival, and make sure that person is prepared to offer a warm welcome!
- What to wear (uniform, lab attire, hard-toe shoes, etc.)
- What the schedule will be
- What the lunch options for the first day will be. If you're hosting a catered lunch meet-and-greet, it goes a long way to ask about food preferences in advance.
- Provide a link to the staff handbook

Work Environment:

Make sure your new employee's work area is set up before the first day.

First impressions count, so providing your new employee with a work area that is "move-in" ready matters.

- Determine designated space (locker, workbench, cubicle, office).
- Organize and clean designated space.
- Make arrangements for furniture (chair, stool, desk, file cabinet).

- Order name plate, if applicable.
- Make sure supplies and equipment are available.
- Arrange for keys or other means of access to the designated space (building, lab, office, locker room).
- Arrange for employee to get Wildcard ID (or paper ID card, if applicable)

Support Network:

Select members your team to be the go-to experienced resource for your new employee during the first few months.

They can help answer questions and provide guidance in the early phases of the onboarding process.

- Announce the hiring of your new employee. Let everyone, including the management team, know when they are starting and in which position.
- Include information about your new employee’s background (previous employment, education, experience, interests).
- Ask others to welcome and show support for your new employee.

Schedule:

The schedule should include a balance of time with others and time alone to read introductory materials and complete orientation-related tasks.

Create a first week schedule so your new employee hits the ground running with meaningful work.

- Plan and schedule any training crucial for your new employee to receive within the first few weeks on the job (including University New Employee Orientation).
- Set up appointments with individuals whom your new employee should meet

early on.

• Set aside time on your calendar to make sure you are available when the new employee arrives on the first day and frequently throughout the first week.

• One-on-one or small group meetings with team members. During these meetings, team members might describe their work and how it integrates with the new employee's work.

• One-on-one meetings with you to discuss position description, performance expectations, appropriate attire, time and leave, etc.

• Designated space and time for the new employee to take the University New Employee Orientation Program. Any time a new employee spends taking the online orientation is considered paid working time.

• Meetings with other key colleagues.

• Tour of campus or larger work environment.

Start Date and Milestone Checklist

Creating a start date and milestone checklist can help ensure that new hires have a smooth transition into their roles and that key onboarding tasks are completed on time.

Here’s a detailed checklist to guide you:

Before Start Date

1. **Offer Letter and Acceptance**
   - Send and receive the signed offer letter.
   - Confirm start date with the new hire.

2. **Pre-Employment Paperwork**
   - Complete background checks and reference checks.
   - Collect signed employment forms (I-9, W-4, direct deposit, etc.).

3. **Workspace Preparation**
   - Set up the new hire’s workspace with necessary equipment (computer, phone, etc.).
   - Create email and system accounts.

4. **Welcome Packet**
   - Prepare a welcome packet with company information, organizational chart, and contact details.

First Day

5. **Orientation**
   - Conduct a company orientation covering history, mission, values, and policies.
   - Review job responsibilities and expectations.

6. **Introductions**
   - Introduce the new hire to their team and key stakeholders.
   - Provide a tour of the office and facilities.

First Week

7. **Training Sessions**

   - Schedule initial training sessions relevant to the new hire's role.
   - Assign a mentor or buddy to assist with the transition.

8. **Check-Ins**

   - Schedule regular check-ins to address any questions or concerns.

First Month

9. **Performance Goals**

   - Set initial performance goals and expectations.
   - Schedule a 30-day review meeting to discuss progress and feedback.

10. **Ongoing Support**

   - Encourage ongoing feedback and provide support as needed.
   - Ensure the new hire feels integrated into the team and company culture.

Milestones

11. **30-Day Milestone**

   - Review initial performance and provide feedback.
   - Address any immediate concerns or training needs.

12. **60-Day Milestone**

   - Conduct a follow-up review to assess progress.
   - Adjust goals and provide additional training if necessary.

13. **90-Day Milestone**

   - Perform a comprehensive review of the new hire's performance.
   - Discuss long-term goals and career development plans.