# HOW TO USE 'MY ONBOARDING CHECKLIST'

My onboarding checklist is a practical list of information and activities which includes:
My first day
My first two weeks
My first three months
My first six months.
It is designed to support new staff members and guiding them through the onboarding process.

Follow these steps to set the onboarding experience by using the onboarding checklist.

## Step 1 – Familiarise yourself with the checklist

Scan the checklist to familiarise yourself.

## Step 2 – Identify reference persons and resources

Identify a reference person and any resources for each activity on the checklist. List the names and resources on the checklist.  If an activity is not relevant to the staff member, mark it as 'not applicable'.

**Reference person –** The reference person will be the line manager in the first instance. However, the line manager may identify other staff to address certain activities.

**Resources** – Some organisation wide resources are identified in the checklist

## Step 3 - Complete and date checklist activities

Use the checklist to guide discussions with the new staff member from the first day through the first six months.  The reference person for each activity should take time to meet with the new staff member and engage in active discussion using resources where applicable.  Supplying resources is not enough. Once completed, note the date on the checklist.

## Step 4 – Sign and file the completed checklist

Once all checklist activities (over six months) have been completed, both the line manager and the new staff member sign it and file it according to the checklist instructions.

# SET & GO - MY ONBOARDING CHECKLIST

**Name: _____ Commencement Date: _____**

| Activity | Reference Person & Resources | Date Completed |
|---|---|---|
| **My first day** | | |
| **Meet and greet new staff member** | Line Manager | |
| **Getting started**<br>▪ Employees –pay cycle details<br>▪ HealthShare – contact for payroll<br>▪ StaffLink – applying for leave, changing banking details, superannuation, transfer of entitlements etc.<br>▪ Contractors – timesheets, approvals and agency systems access<br>▪ Access passes, ID card, keys<br>▪ Ensure your desk phone has a request to change user | Line Manager via the *Pre-arrival Checklist*<br><br><br><br><br><br>*SWSD ticket required* | |
| **Tour of site**<br>▪ Work area<br>▪ Building security<br>▪ Facilities (e.g. tearoom, toilets, car parking)<br>▪ Nearby amenities (e.g. bank, post office, food outlets)<br>▪ Review 'How to' section of the intranet | Line Manager and/or Buddy | |
| **Introductions**<br>▪ Immediate colleagues<br>▪ Supervisors and subordinates<br>▪ Buddy<br>▪ Receptionist<br>▪ Other key contacts (internal and external)<br>▪ Complete 'My Support Crew' summarising key contacts | Line Manager and/or Buddy | |
| **Welcome new staff member**<br>▪ e.g. Morning tea, lunch with colleagues, etc<br>▪ New employees invited to a meet and greet with the Chief Executive 30 minutes prior to the monthly morning tea. This invite will be sent by Human Resources. | Line Manager and/or Buddy<br>*Email from HR with details* | |
| **Emergency/WHS information**<br>▪ Evacuation procedures and assembly points<br>▪ Location of emergency equipment (e.g. fire extinguisher, first aid kit)<br>▪ Identify/meet fire wardens, first aid officers, & WHS reps<br>▪ Reporting accidents/injuries<br>▪ Identifying hazards | WHS Officer / Human Resources<br>*My Health, Safety & Wellbeing* on the Intranet | |
| **Office administration / housekeeping (see also 'How to' material on the intranet)**<br>• Use and cleaning of kitchen facilities<br>• Copying, printing and fax facilities | Line Manager and/or Buddy<br>http://www.heti.nsw.gov.au/Intranet/Admini | |

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| <ul><li>Corporate branding (templates, email signatures, answering the phone)</li><li>Setting up voicemail</li><li>Booking meeting rooms</li><li>SmartPool - Use of company vehicles and booking pool cars</li><li>iProcurement</li><li>Vehicle allowance (needs pre-approval)</li><li>Cab charge</li><li>Redback teleconferencing</li><li>Mail procedure/express post / courier</li><li>Stationery</li><li>Phone list</li><li>Pigeon holes for mail</li><li>Reply paid</li><li>Photocopiers – toners/scanning</li></ul> | strative-and-other-resources/ | |
| **HR Orientation**<br>New employees will be invited to a face-to-face orientation | Human Resources | |
| **Terms and conditions**<br><ul><li>Process for leave requests</li><li>Procedures for calling in sick, late, etc.</li></ul> | Line Manager | |
| **Dress standards**<br><ul><li>Appropriate work attire, casual Fridays</li></ul> | Line Manager | |
| **My first two weeks** | | |
| **Job role**<br><ul><li>Position description - key responsibilities and initial priorities</li><li>Expectations and standards including the CORE values</li><li>Overview of the Performance Development & Review System</li><li>Workplace reporting relationships - portfolio / team organisation chart</li></ul> | Line Manager<br>*Position Description* | |
| **Provide regular and timely feedback**<br><ul><li>Set expectations sooner rather than later</li><li>Positive feedback in a timely manner will reinforce the right behaviour.</li><li>Regular catch up meetings to make sure your report has the 4 C's Content, Clarity, Connections & Culture</li></ul> | Line Manager | |
| **Key organisational policies – follow up understanding**<br><ul><li>Work Health and Safety</li><li>Equity, anti-bullying and harassment, diversity, etc</li><li>Code of Conduct</li><li>Grievance Procedure</li><li>Communications policy (use of internet, email, etc)</li><li>Employee Assistance Program (EAP)</li></ul> | Line Manager | |
| **Review HETI Delegations Manual (if appropriate)** | Line Manager and/or Buddy | |

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| **Review relevant templates and forms** | Line Manager and/or Buddy | |
| **Groups, meetings, networks and email lists**<br>▪ Make sure your new employee is signed up to the relevant groups, meeting invites, networks & email lists to make them feel welcome and to get up to speed | Line Manager and/or Buddy | |
| **Work plan for first six months**<br>▪ Assign first tasks<br>▪ Identify current priorities of the job<br>▪ Complete objective-setting part of Probationary Development Review form | Line Manager<br>*My Career & Development* on the Intranet | |
| **Work Health & Safety training**<br>Identify the appropriate training:<br>▪ Office environment<br>▪ Manual handling and lifting | Line Manager / WHS Officer | |
| **About HETI**<br>▪ Mission, vision, goals, values<br>▪ History and background<br>▪ Our culture<br>▪ Organisation structure<br>▪ NSW Health context<br>▪ HETI Annual Report and other important HETI publications<br>▪ Corporate strategy/plan | Line Manager and Buddy<br>*My Organisation* on the Intranet | |
| **Overview of new staff member's specific unit** | Line Manager and/or Buddy | |
| **Complete any systems training**<br>• TRIM<br>• iProcurement<br>• Recruiting and Onboarding<br>• Redback teleconferencing<br>• Financial reporting<br>• Smartpool | Line Manager | |
| **My first three months** | | |
| **Two month probationary review** | Line Manager<br>*Probationary Review Form* | |
| **Capability training**<br>▪ Undertake any capability training identified to support success within first three months of commencement | Line Manager<br>*My Career & Development* on the Intranet<br>*Online Learning Centre* | |

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| **Performance Development and Review System**<br>▪ Undertake training within first three months of commencement | Line Manager<br>*My Career & Development* on the Intranet | |
| **Leadership skills training**<br>▪ Undertake training within first three months of commencement | Line Manager | |
| **My First 6 Months** | | |
| **Four month and prior to six month probationary review completed** | Line Manager<br>*Probation Review Form* | |
| **Performance and development review signed off** | Line Manager<br>*Performance & Development Review Form* | |

**We have reviewed the above checklist and all aspects have been discussed and completed to our mutual satisfaction.**

Manager's name: _____ Signature: _____ Date: _____

Employee's name:_____ Signature: _____ Date: _____

Once completed and signed, this checklist should be:
*For employees:* Saved by the employee
*For contractors:* Held by the line manager for the term of the contract and for reference should information be requested by the contracting agency.
*For vendor staff:* Held by the manager responsible for the vendor contract and for reference should information be requested by the vendor.