

Onboarding Checklist

This onboarding checklist will help ensure your new hires are set up for success in their new role and will make sure you don't miss any critical steps. Be sure to begin the onboarding process at least one week before your new employee's start date.

Pre-Hire

- Background Check (let them know they will need prior addresses, and sign permission for background check)
- The following information is provided to prospective employee:
 - Where employee handbook can be found (link)
 - Office Hours communicated
 - Sick Leave policy
 - Dress Code
 - Vacation allotment
 - Cell phone policy
 - Mileage/Transportation Reimbursement policy
 - Evaluation guidelines
 - Professional Development budget allotment
 - Workspace information
 - Expectations for special event participation (retreats, holidays, conventions)
- ID copied (driver's license, passport, etc)

Job Offer/Acceptance

- Obtain signed job acceptance letter
- Confirm start date
- Send new employee welcome email (orientation schedule, confirming start date, what to expect on first day...office lunch on first day, etc)
- Record digital signature of Employee Handbook
- Request office furniture preferences (standing desk, office chair)
- Request picture and bio for website/newsletter/bulletin announcement

Prepare new hire paperwork

- Prepare tax forms (W-4 and I-9)
- Set up direct deposit: bring a blank check and social security card
- Sign employment contract/letter or letter of agreement
- Sign non-disclosure, non-compete, intellectual property agreement, or other legal documents
- Provide employee handbook to new employee that they signed
- Provide benefits literature (if eligible) and communicate when benefits kick in/are covered
- Provide Job description or Roles/Responsibilities (for volunteers)
- Set up pre-employment drug test (if required)

- Share mileage policy / reimbursement forms
- Share cell phone policy / reimbursement forms
- Request photo release or image/likeness in media release
- Communicate office hours (in-person/remote expectations)
- Add employee to database with applicable information

Procure Devices, Equipment, Materials

- Set up computer (including keyboard, mouse, etc.)
- Set up phone (landline or cell provided)
- Provide access to shared devices (printer, copier, fax machine, etc)
- Order business cards for new employee
- Order office supplies
- Order name badge
- Assign mailbox
- Order credit card

Set Up Accounts and Create Logins

- WiFi access
- Voicemail
- Email & Email Digital Signature
- Time clock system / time off requests
- Paycheck system (if applicable)
- Access to church/institution database or other job-specific technology
- Building access and Security (building keys, protocols, door access, alarm system)
- Add employee to relevant email distribution lists

Set Up Workspace

- Reserve an office, cubicle, or workstation
- Door nameplate
- Ensure space has a desk, chair, or other necessary office furniture
- Provide necessary office supplies
- Provide a branded welcome kit (swag bag)

First Day / Week 1

- Reminder to bring ID
- Greet new employee & introductions (office meet and greet with coffee/donuts/etc)
- Provide card, badge, or other security assets
- Perform building tour
- Send new hire announcement email
- Schedule team lunch
- Orientation time – share vision, mission, norms, strategic plan
- Provide training plan – database, email accounts, software, livestream software,

- Orientation to denominational structure / practices / traditions / beliefs / acronyms!
- Safe Church training completed by end of week
- Provide directory and annual report
- Provide job descriptions of other employees
- Communicate budget that they are responsible for / financial banking matters

Orientation

- Complete all remaining new hire paperwork
- Discuss benefits and insurance plans
- Review employee handbook
- Review safety policies
- Review technology policies and support process
- Assign a peer mentor
- Share key calendar dates (holidays, retreats, conventions)

During Employment

- Benefits updates
- Changes to hours/salary/employee status/dependents to HR/Bishop's/Synod Office

Offboarding Checklist

- Provide care to leaving employee as well as staff (lunch, celebration time)
- Set aside time to clean out office/workspace
- Collect computer or devices (cell phone/tablet/flash drives) owned by church/organization
- Transfer personal files from computer/devices
- Pay out vacation time
- Record signed resignation letter
- Communicate end date / weeks left to employee and staff
- Send out communication of resignation to staff or church/institution (if applicable)
- Forward emails received to another staff member
- Create work status plan (what needs to be continued, distributed to other staff members, involvement in training a replacement)
- Remove employee from distribution lists and website
- Collect building keys and remove employee from security system
- Change passwords for software utilized
- Notify employee of unemployment benefits (if applicable)
- Remove employees work email or software from phone
- Have exit interview with leadership
- Notify Bishop's/Synod/Organization Office of termination of benefits

Other:

Recommended Policies:

- Building access and security policy