



Employee Onboarding Checklist For Leaders

Supporting leaders to provide a fulsome and positive new employee experience

These checklists provide you with an overview of the tasks to complete at each stage of the onboarding process – from before your new employee’s first day through to their probation completion. Each checklist includes a section that can be customized to the specific needs of your team. For more onboarding resources, visit the Pathway to C.A.R.E. page [here](#).



High volume hiring? Use these tips to improve your new employee’s onboarding experience while allowing you to do things simultaneously and more efficiently:

- Rather than individual check-ins, consider holding group check-ins with new employees.
- Use these check-in discussions to share information, ask questions, provide appreciation, and to have some fun!
- Encourage new employees to ask questions or share concerns – it’s a great way to build trust and team cohesion.



Onboarding remote employees? Use these tips to nurture social inclusion and foster success for your new employee:

- Face-to-face communication is key, even if only virtual.
- Encourage remote collaboration between employees.
- Consider virtual coffee breaks with your team to foster social connection
- Set clear expectations and provide feedback early and often. Celebrate success along the way.



Keep an eye out for low engagement

Signs of possible retention risks	Addressing retention risks
<ul style="list-style-type: none"> • High number of frustrations • Lack of engagement with team culture • Role differs from expectations or does not meet expectations in some way • Does not appear interested in personal development or in helping make improvements • Appears dissatisfied and/or overwhelmed 	<ul style="list-style-type: none"> • Listen to concerns and address in a timely way • Be honest and open on what you can fix and what you cannot fix • Follow-up with your new employee and provide feedback regularly • Provide recognition and appreciation for their contributions and efforts



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Prior to Start Date

Outcome: A welcoming work environment that is prepared for the new employee and affirms their decision to join Island Health.

Task	Check once complete
Send welcome email to your new employee (link to template). <ul style="list-style-type: none"> This email provides details that will help provide certainty for your new employee. Use the template as a starting point, but feel free to personalize it to make it your own. 	
Provide your new employee with their employee number, email address and temporary password (detailed steps are found here).	
Create and submit service requests/order standard equipment (detailed steps are found here).	
Send email to your team welcoming the new employee.	
Talk to your new employee about flexible work options (if operationally supported in your business area).	
Put a welcome plan in place for your new employee's first day. Consider sending them an e-card or a physical card from the team, or ordering them some Island Health swag .	
Assign a peer ambassador. Read the Peer Ambassador's Guide to Success for a full description of this role and how it benefits them, the new employee, and the team.	
Schedule daily check-ins with your new employee for their first week and determine cadence for ongoing meetings. Check-ins are key to building relationships and culture!	
Create a personalized onboarding plan for your new employee using the template here .	
Additional tasks – customize based on needs of role/team	




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Employee’s First Day

Outcomes: *New employee feels welcomed, comfortable, prepared and supported; begins to understand the position and performance expectations.*

Task	Check once complete
<p>If employee is working on-site: tour the building and immediate area and introduce your new employee to the team.</p> <p>If employee is working remotely: schedule a time at the beginning of the day to welcome them and provide a first week schedule so they know what to expect. Review the tips on how to nurture social inclusion and foster success on page 1 above.</p>	
<p>Introduce your new employee to their peer ambassador.</p>	
<p>Meet with your new employee to review the following:</p> <p>Workplace guidelines: review working hours, break times, reporting lines, who to notify in case of illness, how to request leaves/vacation time, approval processes, what to do if they will be late, what to do in case of emergency, etc.</p> <p>Role and team information: review key job duties and expectations, how their role fits into the organization, team overview, culture, organizational charts, meetings they’ll be required to attend, their personalized onboarding plan, etc.</p> <p> Moments of human connection throughout the day will go a long way to build feelings of trust, belonging and engagement with the team.</p>	
<p>Identify key people that your new employee should be introduced to. Schedule meetings and/or send email introductions.</p>	
<p>Ensure your new employee is on the correct email distribution lists and added to meeting invites.</p>	
<p>Additional tasks – customize based on needs of role/team</p>	



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Employee’s First Week

Outcomes: *New employee builds knowledge of internal processes and performance expectations; feels settled into the new work environment; continues to develop, learn about the organization, and build relationships.*

Task	Check once complete
Meet with your new employee to: <ul style="list-style-type: none"> • discuss your leadership style and approach to feedback. • discuss the probationary process and how/when performance will be assessed. • provide an overview of the intranet and communication channels. • share information on unwritten practices and traditions (i.e. Casual Friday, bringing cake for employee birthdays, etc.) 	
Meet with your new employee to establish some initial work goals.	
Schedule regular meetings to touch base, review and clarify performance objectives, expectations, project updates, and answer questions.	
Ensure you’re checking in with your new employee each day to make sure they feel supported.	
Additional tasks – customize based on needs of role/team	




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Employee's First Month

Outcomes: *New employee is becoming fully aware of their role and responsibilities, beginning to work independently and produce meaningful work. They continue to feel acclimated to the environment both functionally and socially.*

Task	Check once complete
<p>Host regular check-ins with your new employee.</p> <ul style="list-style-type: none"> • Share information, ask questions, provide appreciation and have a little fun! • Encourage your new employee to ask questions or share concerns; it's a great way to build trust and team cohesion. <p> Suggested check-in questions:</p> <ul style="list-style-type: none"> • What has been going well for you? • What challenges have you had? • Do you have the tools and equipment you need to do your job? • Is there anything we should change to help new employees during their first month with Island Health? • Is this job what you thought it would be? If not, how is it different? 	
<p>Provide performance feedback, address performance concerns, reinforce positive contributions; look for opportunities to provide clarity on performance expectations.</p>	
<p>Explain how performance is managed and encourage them to start developing formalized personal goals based on Island Health's strategic framework.</p>	
<p>Review progress toward initial goals.</p>	
<p>Identify any additional job specific training needed.</p>	
<p>Consider sending a card or e-card to celebrate your new employee's first month.</p>	
Additional tasks – customize based on needs of role/team	

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Employee’s First Three Months

Outcomes: *New employee is fully engaged in new role – applies skills and knowledge, makes sound decisions, contributes to team goals, and develops effective working relationships. They have gained greater confidence in their role, begin to take on additional assignments and work with an appropriate level of autonomy.*

Task	Check once complete
Evaluate goal achievement and set new goals.	
Provide tasks of increasing complexity to further develop your new employee.	
Provide performance feedback, address performance concerns, reinforce positive contributions; look for opportunities to provide clarity on performance expectations.	
Invite feedback from your new employee about the overall onboarding process. Consider providing this feedback to the onboarding team at onboarding@islandhealth.ca so that the program can be continuously improved.	
If applicable, has your new employee successfully completed their probationary period? Acknowledge this by meeting to discuss their performance and provide an email confirming probation completion (note: probation periods vary by collective agreement/terms of employment).	
Additional tasks – customize based on needs of role/team	



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Employee’s First Six Months

Outcomes: *New employee is functioning at the full working level of the role. They are recognized as a valuable member of the team and applies their skills and knowledge to achieve individual and team goals.*

Task	Check once complete
<p>Schedule a “stay conversation” with your new employee to learn about what’s working well and what needs improvement. Key questions to ask:</p> <ul style="list-style-type: none"> • What do you most look forward to about your work? • What are you learning here and what do you want to learn? • Why do you stay here? • When was the last time you thought about leaving and what prompted it? • What can I do to make your job better for you? <p>For more information on how to conduct a stay conversation, click here.</p>	
<p>Evaluate goal achievement and set new goals of increasing complexity.</p>	
<p>Provide positive coaching, review issues/challenges, and provide regular, informal feedback.</p>	
<p>Discuss career development goals and how you can support them.</p>	
<p>Invite feedback from your new employee about the overall onboarding process. Consider providing this feedback to the onboarding team at onboarding@islandhealth.ca so that the program can be continuously improved.</p>	
<p>If applicable, has your new employee successfully completed their probationary period? Acknowledge this by meeting to discuss their performance and provide an email confirming probation completion (note: probation periods vary by collective agreement/terms of employment).</p>	
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