Onboarding Checklist for Remote Workers

Pre-Arrival

Engage Early to Welcome

- [ ] Reach out to the new team member as soon as the offer is accepted to welcome them
- [ ] Confirm start date and working hours
- [ ] Share the best way to get in contact with you if they have questions
- [ ] Establish an onboarding buddy and trainer

Technology Access and Setup

- [ ] Discuss technology requirements (e.g., laptop, webcam, headset, internet reliability, etc.) and order any necessary equipment
- [ ] Communicate when and how they should expect to receive their equipment

Ways to Socialize

- [ ] Inform your team of the new team member using the Welcome to the Team template
- [ ] Copy the new team member on upcoming events or messages
- [ ] Have the team send a ShineWell welcoming them to the team
- [ ] Schedule a team meeting for introductions for the new employee's first day (with cameras on)

Scheduling

- [ ] Create the first week schedule and share a drafted agenda before their start date
- [ ] Put a reminder on your calendar for the new employee's first day, 30-60-90-day and one-year work-anniversary
- [ ] Schedule automated calendar invites for 30-60-90-day reviews

First Day

Work Environment

- [ ] Explain how the employee can get additional office supplies
- [ ] Discuss having a set workspace and ways to minimize distractions if working remotely is new to the new team member
- [ ] Be intentional with checking in at the end of the day

Technology Access and Setup

- [ ] Work with your employee to coordinate a pickup for their equipment
- [ ] Ask about their comfort levels with platforms your team commonly uses, such as Microsoft Teams, Outlook, SharePoint, Zoom, OneDrive, etc.

Ways to Socialize

- [ ] Be available to greet them on their first day
- [ ] Introduce them to others in the facility
- [ ] Take them to lunch
- [ ] Have team member complete the "Meet and Greet" form
- [ ] Set up recurring 1:1 meetings for you and the new team member

Scheduling

- [ ] Make it a priority to virtually greet the team member
- [ ] Have them complete the optional "Tell Us About Yourself" form
- [ ] Set up recurring 1:1 meetings for you and the new employee

First Day to Day 30

Policies and Procedures

- [ ] Explain policies and procedures for overtime (for hourly employees), annual and sick leave accruals and proper use, holidays, etc.
- [ ] Explain how to request leave and properly report off from work (is it okay to text or do you need to call?) Explain PTO/EIB

Technology Access and Setup

- [ ] Ensure team member has proper access to email, UKG, EPIC, Workday etc.

Ways to Socialize

- [ ] Set up informal, rotating meetings with leaders or departments outside of their immediate team.

Performance Management

- [ ] Provide ongoing performance feedback during 1:1's
- [ ] Explain the performance review and goal-setting process
- [ ] Show how to enter Individual Development Plan, goals, certifications, licenses, etc.

Day 30-60-90

Day 30

- [ ] Recognize and celebrate their 30-day milestone to reinforce their contributions
- [ ] Establish clear goals and ensure alignment on expectations for the next phase of their onboarding journey
- [ ] Connect with their preceptor, trainer, and onboarding buddy to gather insights on their progress, engagement, and any support needs
- [ ] Complete the 30-day check in

Day 60

- [ ] Celebrate 60 days on the team
- [ ] Make sure they understand their role and day-to-day functions
- [ ] Ask if they're encountering any challenges or obstacles
- [ ] Complete the 60-day check in

Day 90

- [ ] Celebrate 90 days on the team
- [ ] Complete the 90-day check in