On Boarding CHECKLIST

Manager

Stage 1: Pre-Arrival	
☐	Stay in regular contact with the new employee, especially if there is a long period between the job offer and the start date.
☐	Gather reference materials (i.e., phone list, organizational chart with titles, staff lists, other contact lists, voicemail and email instructions, job description, etc.).
☐	Identify a "**Peer Partner**" and determine how you will work together to successfully onboard the new employee (i.e., you may delegate many of the tasks in these checklists to the Peer Partner).
☐	Host a meeting with the peer partner, administrative staff and other team members directly involved in the new employee's onboarding process to ensure all tasks are covered.
☐	Shortly before the start date, send the new employee their letter of offer, the welcome email/letter, the workplace information package and a copy of the New Employee or Student Onboarding Checklist. Ensure that the location, contact information and the date and time of arrival on the first day are made explicitly clear. Examples of key welcoming documents can be found here: o Welcome email o Announcement to coworkers o Workplace information kit (to be attached to the welcome email)
☐	Ensure the new employee's coordinates are added to appropriate contact and distribution lists.
☐	Email co-workers and key contacts of the new employee to indicate the new employee's start date and their role.
☐	Ensure the new employee has basic accommodations (i.e. workstation, computer, telephone, etc.)
☐	Find out if the new employee requires any special workplace accommodations.
☐	Prepare an assignment for the new employee within the first week.
☐	Notify security that the new employee will need a temporary access pass on their first day.

What is a PEER PARTNER?

A peer partner assists hiring managers and shares the work involved with onboarding a new employee. They play an informal but vital role in making the new employee feel at ease during their transition into the new job. Selected on a voluntary basis, the peer partner should be a high-performing individual, have strong interpersonal skills and have shown his or her commitment to their job, the organization and our shared public sector values

Although it will be up to the hiring manager to decide which onboarding tasks will be the responsibility of the peer partner, the partner's main role is essentially to be available to provide information, general advice, guidance and encouragement. They are there to answer any questions that the new employee may have in their first few months on the job.

Stage 2: First Day, First Week

First Day

☐	Greet the new employee at the front entrance of the building and give them a warm welcome.
☐	Escort the new employee to your workspace and discuss the plan for the day – acknowledge that the first few days can be very overwhelming and that you know how it feels because you have been there too.
☐	Review with the new employee their letter of offer, terms and conditions of employment, relevant provisions in the collective agreement (if applicable), salary (or wage), values and ethics codes (organizational and public sector), employment equity self-identification, and any required training and accommodation needs. Note: for student employees, refer them to the Terms and Conditions of Employment for Students.
☐	Have a discussion with the new employee about working hours, breaks, leave reporting and language of work.
☐	Administer the oath or solemn affirmation (for first time employees only).
☐	Introduce the new employee to their peer partner and discuss their role.
☐	Introduce the new employee to co-workers in their unit and division.
☐	Escort the new employee to meet with security services for a photo card and security access card.
☐	Show the new employee their workspace and provide cabinet keys and the combination to the safe (if applicable).
☐	Provide the employee with a tour of the workplace and show them the location of the washrooms, kitchen areas, cafeteria, printers, photocopiers, recycling, etc.
☐	Explain basic health and safety information to the new employee (i.e., building exits, fire drill routes, first aid kit, etc.).
☐	Provide office supplies and ensure the new employee has access to basic reference materials (i.e. phone list, organizational chart with titles, staff lists, other contact lists, voicemail and email instructions, job description, etc.)

First Week

☐	Schedule appointments for the new employee to meet with points of contact to discuss required training and/or briefing sessions (i.e., security, information systems, etc.).
☐	Verify that the new employee has completed the Mandatory Training for New Employees.
☐	Confirm that the new employee's work station is properly set up and that any required accommodations have been met.
☐	Follow up with Public Service Pay Centre and the required training coordinator to ensure the new employee has received all required forms.
☐	Discuss and provide your new employee with key information for pay services (i.e., Phoenix Self-Service/Compensation Web Application, MyEMS PeopleSoft).
☐	Set time aside to help the new employee register for "*MyKey*" and explain how and when it is used (i.e., Compensation Web Application, performance management application).
☐	Point the new employee to, and discuss if necessary, key government-wide policies (i.e., IT acceptable usage, harassment prevention, workplace health and safety, disclosure of wrongdoing, access to information and privacy, etc.).
☐	Discuss with your new employee organizational structures and how they fit within it
☐	Assist the new employee in creating necessary online accounts (e.g., GCConnex, GCPedia, GCCampus).
☐	Discuss the performance management process with the new employee, including the probationary period attestation and how performance will be assessed. Provide the new employee with a link to the performance management application and "claim" him/her in the system. Meet with the new employee to establish preliminary work objectives and a learning plan (including all required courses and training).
☐	It is a good opportunity to ask if the employee requires any special workplace accommodations.
☐	Suggest that the new employee consider initiating one-on-one meetings with other team members to better understand their key files and priorities.
☐	Don't forget to check out and share these handy resources: iService (the internal, departmental web site), Intersection (newsletter for all ESDC employees), The Top HR Clicks for Employees, The Top HR Clicks for Managers, HRinfo (newsletter for managers on HR issues)

Stage 3: First Month	
☐	Establish the new employee’s performance management agreement and provide the new employee with preliminary feedback on their performance.
☐	Follow-up on any questions the new employee may have regarding HR and/or compensation, workplace accommodations. If required, submit a ticket to the Human Resources Service Centre (HRSC) portal.
☐	Ask if the employee has any questions regarding compensation and benefits and provide them with appropriate information.
☐	Meet with the peer partner to review the new employee’s integration into the workplace, and to ensure all essential onboarding tasks have been met to date.
☐	Ask the new employee if they have any interest in finding a **mentor** and if so, offer to help find them one.
☐	Confirm that the new employee has enrolled in any required job-specific training (including mandatory occupational health and safety training specified in Module 5 of ESDC’s OHS Program).
☐	Meet with the new employee to discuss the onboarding process and their experience to date.

What is the difference between a peer partner and a MENTOR?

A peer partner is a team member and is there to answer any questions a new employee may have, and help them navigate and integrate into the organization.

A mentor, on the other hand, is typically more experienced and does not work directly with the employee. Their role is to guide and assist the new employee with their professional and personal development.

TIPS for Managers to help New Employees find a mentor

Begin by asking the new employee to look for people in the organization who they admire for their skill, knowledge and leadership. You could suggest to visit ESDC’s Mentoring Program SharePoint site and/or refer the new employee to National Mentoring Inventory.

You may also know of colleagues or supervisors who you feel could be a good match.

Qualities to look for in a mentor include:

- *Available and willing to spend time and give appropriate guidance and feedback;*
- *Experienced in a field of interest to the new employee;*
- *Knows how to develop a career path within the Public Service; and*
- *Enjoys helping others and is flexible, empathetic, and encouraging.*

Stage 4: 3 – 6 Months (*Note*: this may not apply to student employees)	
☐	Revisit the new employee’s work objectives and provide feedback on their performance to date.
☐	It is also a good opportunity to ask if the employee requires any workplace accommodations.
☐	Highlight any concerns you may have with the new employee and make interventions, as necessary.
☐	Ask the new employee about their integration to the team and how they are adjusting to their new work environment.
☐	Ask the new employee for feedback on the onboarding process and commit to improving, if applicable.
☐	Ensure that the new employee has completed all mandatory training and follow-up on suggested learning activities.
☐	Discuss professional development and networking opportunities within the organization that the new employee may want to consider.

Stage 5: Year 1 (*Note*: this may not apply to student employees)	
☐	Conduct a year-end performance assessment based on established work objectives.
☐	If the employee has succeeded, indicate in writing that they have successfully completed the probationary period (if applicable).
☐	Discuss with the new employee their overall impressions of the workplace – you could ask questions such as: o Is the job what you expected? o Are you getting all the information you need to do your job? o Do you feel included and part of your team? o Do you feel recognized for your contributions o Have you noticed anything we can improve on?
☐	Congratulate the new employee on their first year with your organization (whether it be in the federal Public Service, with the department or your unit)!