

## Employee Orientations

### Overview

Orientation is the process of introducing new employees to your practice, to their supervisors and coworkers (if there are any), and to their jobs. After you have completed the following forms required by law:

- W-2
- I-9
- Any new hire reporting information required by your state

...You'll want to concentrate on bringing your employee into your business by arranging for an orientation.

Whatever form it takes, an orientation session serves several purposes:

- It gets the new worker started on productive activity.
- It ensures that new employees get accurate information. Coworkers do not always give the right answers, for whatever reasons.
- It gives you the chance to develop good work habits in your new employee.
- It can help the newcomer feel welcome, relieve anxiety, and start the person toward being a loyal, productive member of your business.

But what should an orientation cover?

- A review of the job description with the new employee, so he or she knows what the specific duties will be (although the employee should have a general idea from the interview)
- Some discussion of what your business does and what your business goals are
- How the employee's job fits into the overall picture
- Basic work rules
- Compensation and benefits
- A tour of the workplace

The sample orientation checklist that follows can be modified to fit your specific needs.

# NEW EMPLOYEE ORIENTATION CHECKLIST

*Note: All appropriate information should be discussed with each new employee.*

Employee's Name \_\_\_\_\_ SSN: \_\_\_\_\_

Job Title: \_\_\_\_\_ Date of Hire: \_\_\_\_\_

The information checked below has been given or explained to the employee by the practice owner.

## 1. *Compensation and Benefits*

- |  |  |
|--|--|
| <input type="checkbox"/> W-2 Form                  | <input type="checkbox"/> Sick Benefits—Limitations, etc. |
| <input type="checkbox"/> I-9 Form                  | <input type="checkbox"/> Performance Evaluations         |
| <input type="checkbox"/> State Required Forms      | <input type="checkbox"/> Promotions                      |
| <input type="checkbox"/> Time sheet/card           | <input type="checkbox"/> Transfers                       |
| <input type="checkbox"/> Payroll Procedures        | <input type="checkbox"/> Vacations                       |
| <input type="checkbox"/> Insurance Program Booklet | <input type="checkbox"/> Holidays                        |
| <input type="checkbox"/> Pension Plan Booklet      | <input type="checkbox"/> Absences/Tardiness              |
| <input type="checkbox"/> Educational Assistance    | <input type="checkbox"/> Jury Duty                       |
| <input type="checkbox"/> Credit Union              | <input type="checkbox"/> Leaves of Absence               |
| <input type="checkbox"/> Savings Bond Plan         | <input type="checkbox"/> Maternity Leave/FMLA Leave      |

## 2. *General*

- |  |  |
|--|--|
| <input type="checkbox"/> Mission Statement                                   | <input type="checkbox"/> Ethics Statement                  |
| <input type="checkbox"/> Employee Handbook/Labor Agreement/Rules Booklet     | <input type="checkbox"/> Transportation                    |
| <input type="checkbox"/> Disciplinary Procedures                             | <input type="checkbox"/> Parking Facilities                |
| <input type="checkbox"/> Dress Code/Safety Requirements                      | <input type="checkbox"/> Safety Booklet                    |
| <input type="checkbox"/> Complaints, Discrimination and Grievance Procedures | <input type="checkbox"/> First Aid/Reporting Injuries      |
| <input type="checkbox"/> Proprietary Information Agreement                   | <input type="checkbox"/> Bulletin Board/Company Newsletter |
|  | <input type="checkbox"/> Voluntary Resignation Notice      |
|  | <input type="checkbox"/> I.D. Card                         |

The following is a checklist of information necessary to orient the new employee to the job as well as your practice's philosophy. Please check off each point as you discuss it with the employee.

---

### **3. *Receive the New Employee***

---

- Review a copy of the employee's application. Be familiar with the employee's experience, training, and education.
- Review the job description with the employee, including the duties, responsibilities, and working relationships.
- Explain the total organization and how the employee fits in.
- Find out the employee's career goals and objectives. Relate them to the goals and objectives of their position and the department.
- Confirm that the employee has a copy of the Employee Handbook. Set aside at least two hours in the first week for the employee to read the Employee Handbook and to understand it.

### **4. *Welcome the New Employee***

---

- Introduce the new employee to their co-workers:
  - Indicate to each co-worker what the new employee's position will be.
  - Explain the functions of each person to the new employee as you introduce them.
- Show the new employee around:
  - Tour the facilities.
  - Explain where the lavatories, coffee and/or break areas, and the parking facilities are located.
  - Explain the various areas within the facility and their interrelationship.
  - Set a time and date, within one week, to cover any questions or concerns of the new employee and check on progress.

## **5. Introduce the New Employee to Job**

---

- Insure the new employee's work area, equipment, tools and supplies are prepared and available.
- Have the employee sign for any tools, equipment, vehicles, etc. provided by the company.
- Explain the levels of supervision with the business.
- Provide the new employee with the necessary or required training.

Explain the use of:

- |                                       |  |
|---------------------------------------|--|
| <input type="checkbox"/> Telephone    | <input type="checkbox"/> Mail Procedures   |
| <input type="checkbox"/> E-mail       | <input type="checkbox"/> Supply Procedures |
| <input type="checkbox"/> Copy Machine | <input type="checkbox"/> Company Vehicles  |

- Explain the hours of work, overtime procedures, and call-in procedures.
- Give the new employee the business telephone number.
- Review the location of the business' first aid equipment.
- Explain any housekeeping responsibilities.

## **6. Introduce the New Employee to Products & Services, Customers, Clients, Vendors and Competitors**

---

- Explain your unique business approach to providing products & services.
- Explain the products and services your provide.
- Explain company customers, clients, vendors, and competitors.

---

Supervisor Signature

---

Date

---

Employee Signature

---

Date