DEPARTMENT OF HUMAN RESOURCES

Hiring and Onboarding Checklists

This is a high-level summary overview of the steps in the hiring and onboarding process from pre-hire to six months. For details on each step, including a comprehensive onboarding plan, please review each section of the Hiring and Onboarding guide located on the Department of Human Resources website.

Hiring Checklist

☐ **APPROVAL TO RECRUIT**

☐ **JOB POSTING INFORMATION**

Position Title: ______________________ Manager: ______________________

Position #: ______________________ Type: ☐ Permanent ☐ Ltd Service ☐ Temporary ☐ Interim ☐ Exempt ☐ Intern (☐ Unpaid ☐ Paid)

Position Description: ☐ Brief description/overview (1-2 paragraphs)
☐ Special Requirements/Preferred Qualifications (if applicable)
Recruitment: ☐ Internal Recruitment (☐ State ☐ Dept. ☐ Division) **OR** ☐ Open/Competitive
Advertising: ☐ Standard OR ☐ Additional Venues________________________

VIEWING AND SCREENING APPLICANTS

☐ Review all candidates for position (applications and resumes/cover letters provided)
☐ Determine top candidates based on screening qualification criteria

INTERVIEWS AND REFERENCE CHECKS

☐ Determine interview panel and review roles, questions, and response rating criteria
☐ Schedule and conduct interviews; rate responses and rank candidates
☐ Document interview in SuccessFactors
☐ Check references on top candidate(s)

VERBAL OFFER & START DATE

☐ Make verbal conditional offer and determine the firm start date

Once you have the tax results (in good standing), you may make a verbal offer to your candidate and choose a start date. Current state employees must start at the beginning of a pay period. External candidates can start whenever, however, the start of a pay period is recommended. **Please note, it normally takes 10 business days after acceptance of the official job offer in the **SuccessFactors** system to establish an employee ID and other accounts, which is why it is generally best practice to **schedule the start date at least two weeks out** from the date of acceptance.*

MOVE THE APPLICANT TO "OFFER"

☐ In Successfactors, move the candidate to "offer" stage.

OFFICIAL OFFER LETTER

☐ The Hiring Manager will be sent notification when the offer letter has been sent to and accepted (or denied) by the candidate.

☐ Notify other applicants that they have not been selected for the position by updating status in the system to "not selected".

Note: Start date is **very important** to ensuring your candidate will have all the resources and access to computer systems when they show up for their first day of employment. **The sooner DHR receives notification through the system (official job acceptance) the better to ensure your new hire has access to computer systems, badge access, parking permits, etc., on their first day.**

After Official Offer Acceptance Checklist

COMPLETE HIRING PACKET

☐ Complete required forms as part of the Hiring Packet. Note: hiring packets need to be retained by the hiring manager for seven years.

Onboarding Checklist

INITIAL ONBOARDING Tasks

Supervisors must coordinate with the appropriate Agency/Department/
Division personnel to ensure that their new employee has the proper access and equipment to begin work on their first day. Tasks include:

- ☐ New hire paperwork
- ☐ PAR for new hire/transfer
- ☐ Prepare badge paperwork
- ☐ Building Access Card and/or keys
- ☐ Email Account
- ☐ Identify relevant Email lists
- ☐ Folder Access
- ☐ Computer Equipment
- ☐ Software
- ☐ Phone
- ☐ Order office or work area keys, business cards, and name plate (if applicable)

WELCOME EMAIL AND PHONE CALL

☐ Call new hire to congratulate and welcome to the team, give information on first day, location, any uniform requirements (if applicable).

☐ Send the employee an email to welcome them and set expectations for their first day at work (start date, time, location, parking, reminder to bring identification, etc.)

PREPARE A NEW EMPLOYEE ANNOUNCEMENT

☐ Send a new hire announcement

Prepare a new hire announcement so that other employees/departments are aware and can join you in welcoming the employee.

IDENTIFY A BUDDY

☐ Identify a buddy to assist with employee onboarding and serve as a resource for information (Note: the buddy is a voluntary function of current employee). Meet with buddy to set expectations.

Prior to First Day Checklist

Prepare First Day Welcome Packet that includes:

- ☐ Welcome Letter
- ☐ Job Description
- ☐ Contact Names and Phone lists
- ☐ Building or facility map
- ☐ Building card and/or keys
- ☐ Parking and transportation information
- ☐ Mission and values of the organization – including how their position is tied to the state's strategic priorities. If you are unsure, please consult your manager. Here is a link to those priorities.
- ☐ Information about your department/functional group
- ☐ Where to obtain supplies

☐ Check with IT to ensure computer is set up and accounts have been created

☐ Inspect work area to ensure desk, lighting, trash can, chair and computer are in place and workspace is clean

ORIENTATION ACTIVITIES

☐ Plan the employee's first project or assignment and first week schedule.

☐ Check email system to ensure email is available.

☐ Send a welcome email to your new employee on the state's email system which will be available for their first day.

☐ Send the employee to any department specific orientations there may be.

First Day Checklist

☐ Give employee key(s) and building access card and take him/her on a building tour.

☐ Explain policies and procedures, including work hours, flexible work policies, overtime, use of vacation and sick time, holidays, safety and workplace respect, etc.

☐ Remind employee to complete tasks on the new hire portal and fill out HR and benefits paperwork.

☐ Have desk and computer etc. ready, welcome sign & folder with most important info (e.g. abbreviations, acronyms, contacts, …).

☐ Tour of the facility.

☐ Provide department or building-specific safety and emergency information.

☐ Explain how to get supplies.

☐ Ensure employee can log in to computer, systems and explain basics for technology equipment (e.g. voicemail, email, LMS, and department specific systems).

☐ Talk about how to be successful at organization.

☐ Introduce executive staff.

☐ Talk about resources at organization (ex. LMS, Badges, VTHR, Benefits, deposits, DHR, Wellness, IT, Social Media, Share Point, Records, department specific resources).

☐ Discuss projects / tasks and expectations.

☐ Clarify the first week's schedule and confirm required and/or recommended training.

☐ Review job description, outline of duties, and expectations. Describe how employee's job fits in the department and how it contributes to the larger organization **as well as the state's strategic priorities.**

☐ Provide an overview of the organization: its purpose, organizational structure, and goals.

☐ Organizational culture / values and culture / rules in team

☐ Introduce team, meet with buddy.

☐ Remind employee to review and complete the assigned mandatory classes and sign up for any in-person classes in the LINC learning management system. **The supervisor is responsible for registering the employee for the following PMA classes: Office Ergonomics - Making it Fit: Improving Our Office Comfort and Defensive Driver.**

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- ☐ Explain applicable department policies.
- ☐ Assign job required trainings (if applicable) and discuss with employee.
- ☐ Explain the annual performance review.
- ☐ Debrief with employee after she/he attends initial meetings and training and begins work on initial assignment. Touch base often throughout the week.
- ☐ Introduce new employee to other supervisors, managers and stakeholders.
- ☐ Consider hosting a special breakfast or snack to help your new employee meet the team on an informal basis.
- ☐ Invite the employee to do a short “about me” presentation at your next team or staff meeting.
- ☐ Check with employee to ensure they have received the email invite for the DHR New Employee Orientation from the LINC system.

First Week Checklist

- ☐ Ensure employee has attended any in person department orientations and finished all hiring documents.
- ☐ Elicit feedback from the employee and be available to answer questions.
- ☐ Have employee “shadow” supervisor at meetings to get exposure to others and learn more about the department and organization.
- ☐ Ensure employee is signed up for any further training.
- ☐ Continue clarifying work roles and responsibilities.
- ☐ Continue introducing employee to key people and bring him/her to relevant events.
- ☐ Connect new employee with other new employees (e.g. the ones from first day).
- ☐ Set meetings for new employee and key agency/department/division staff for an introduction to the organizational structure. Consider providing the department/division organizational chart so employee can see how they fit into the organization.
- ☐ Support networking.

Second to Third Month Checklist

- ☐ Review work plan and progress on tasks.
- ☐ Informal performance review; verify employee has the tools.
- ☐ Increase responsibility.
- ☐ Continue to support networking.

Third to Sixth Month Checklist

- ☐ Continue to check in with employee on work projects and understanding of department policies.
- ☐ Complete Probationary Period review. Review changes to job responsibilities.
- ☐ Create individual development plan (IDP). Discuss career goals and include appropriate trainings in IDP.