

CHECKLIST | REMOTE ONBOARDING

Presented by Siders Insurance Solutions

Remote work has become an expanded practice that's likely to continue even post-coronavirus. During these times, it's no longer just seasoned employees working from home—it's also new hires, and employers are being challenged with the task of onboarding increasingly more remote employees than ever before. This includes planning an effective technology experience, acclimating remote hires to their new roles and sharing the necessary knowledge for a new employee to succeed within your remote environment. This checklist outlines steps for employers to consider as they plan a remote onboarding process.

Before the Employee's First Day	
Confirm the employee's start date.	<input type="checkbox"/>
Confirm the start time and any other expectations for the employee's first day.	<input type="checkbox"/>
Send the new employee a request to complete new-hire paperwork, including Form I-9, tax forms, a direct deposit form and emergency contact information.	<input type="checkbox"/>
Plan the employee's orientation, initial training and assignments.	<input type="checkbox"/>
Contact the employee with a detailed schedule and itinerary for Week 1.	<input type="checkbox"/>
Plan the employee's workstation and technology.	<input type="checkbox"/>
Communicate technology and workstation expectations of the employee ahead of their start date.	<input type="checkbox"/>
Order equipment and plan for necessary software.	<input type="checkbox"/>
Add the employee to relevant email distribution lists.	<input type="checkbox"/>
Add regularly scheduled meetings to the employee's calendar.	<input type="checkbox"/>
Email the employee's department with relevant information about their new team member—such as his or her start date, role and a brief bio—and copy the new employee, if appropriate.	<input type="checkbox"/>
Select and meet with the new hire's mentor, if applicable.	<input type="checkbox"/>
Set up meetings with critical people for the employee's first few weeks.	<input type="checkbox"/>
Order any necessary training materials.	<input type="checkbox"/>
Order business cards for the new employee, if necessary.	<input type="checkbox"/>
Arrange pertinent training required for the job.	<input type="checkbox"/>

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Workstation Environment and Setup	
Adequate space within the employee's home for an office	<input type="checkbox"/>
Desk or work area with sufficient space for equipment	<input type="checkbox"/>
Comfortable and ergonomic office chair	<input type="checkbox"/>
Workstation area that complies with ergonomic and safety guidelines	<input type="checkbox"/>
Environment with minimal noise and distractions	<input type="checkbox"/>
Workstation in a location with broadband network able to download and upload at a minimum of 1.5 megabytes per second (Mbps)	<input type="checkbox"/>

Workstation Technology	
Desktop or laptop, either provided by the employer or employee	<input type="checkbox"/>
Internal network access given to employee for all necessary job functions	<input type="checkbox"/>
Adequate hard drive capacity and memory on computer to perform necessary job duties	<input type="checkbox"/>
If video calls will be part of the employee's job responsibilities, computer includes a webcam	<input type="checkbox"/>
Arrange for employee phone service and/or phone plan	<input type="checkbox"/>
Headset with microphone	<input type="checkbox"/>
Power cord	<input type="checkbox"/>
Mouse	<input type="checkbox"/>
Mouse pad	<input type="checkbox"/>
Keyboard	<input type="checkbox"/>
Virtual private network (VPN) established for employee's computer	<input type="checkbox"/>
Other technology as required by the roles and responsibilities of their position	<input type="checkbox"/>

First Day	
Introduce the employee to the virtual workspace.	<input type="checkbox"/>
Show the employee team sites, employee intranet and necessary tools.	<input type="checkbox"/>
Review the outline of duties and expectations for the first week.	<input type="checkbox"/>
Review hours of work, and explain policies and procedures for overtime, use of vacation, sick time and holidays.	<input type="checkbox"/>
Be available to greet the employee on the first day.	<input type="checkbox"/>
Introduce the employee to others in the workplace and their mentor.	<input type="checkbox"/>
Explain how to get IT support.	<input type="checkbox"/>
Explain how to utilize HR.	<input type="checkbox"/>
Provide information on setting up voicemail and their computer.	<input type="checkbox"/>
Ensure that the employee has a fully functioning workstation.	<input type="checkbox"/>

First Week	
Give the employee their initial assignment—something small and doable.	<input type="checkbox"/>
Briefly check in with the employee each day to address any questions or concerns that may arise.	<input type="checkbox"/>
Explain the annual performance review and goal-setting process.	<input type="checkbox"/>
Review the process related to the probationary period, if applicable.	<input type="checkbox"/>

First Three Months	
Conduct regularly occurring one-on-one meetings while giving timely, useful feedback.	<input type="checkbox"/>
Meet for an informal three-month performance check-in.	<input type="checkbox"/>
Create written performance goals and professional development goals.	<input type="checkbox"/>
Meet with the employee’s mentor to review the initial stages of mentorship and answer questions.	<input type="checkbox"/>
Make sure that the employee is a part of ongoing conference or video calls on a regular basis.	<input type="checkbox"/>

Ensure the employee has attended all scheduled training and is signed up for any future training sessions that may be needed.	<input type="checkbox"/>
Provide information about continued learning opportunities, if applicable.	<input type="checkbox"/>

First Six Months	
Conduct a six-month performance review.	<input type="checkbox"/>
Review progress on performance goals and professional development goals.	<input type="checkbox"/>
Review the status and performance of the employee's remote workstation and technology.	<input type="checkbox"/>

First Year	
Celebrate successes and recognition of the employee's contributions.	<input type="checkbox"/>
Continue providing regular informal feedback, and provide formal feedback during the annual review process.	<input type="checkbox"/>
Have a conversation with the employee about his or her experience to date.	<input type="checkbox"/>
Discuss potential goals for the next year.	<input type="checkbox"/>
Discuss the employee's professional development goals and identify relevant learning opportunities.	<input type="checkbox"/>
Survey the employee about their onboarding experience.	<input type="checkbox"/>

Use this checklist as a guide when planning the remote onboarding process for new employees joining your organization. For assistance with remote work planning, contact Siders Insurance Solutions.