



FixHR

Employee Onboarding Checklist for Small Businesses

- Issue employment agreement, ensuring all required information is included. Have this returned signed before you proceed with your onboarding.
- Provide a warm welcome and introduction to the workplace environment.
- Collect necessary employee details, such as tax information and emergency contacts.
- Set up payroll and ensure compliance with tax obligations.
- If relevant, provide a tour of the workplace, highlighting key areas and amenities.
- Provide an orientation session on company policies, procedures, and expectations. Ensure the employee understands their rights, entitlements, and benefits, and 90 day trial implications (if applicable). Provide access to the employee handbook and other relevant documentation.
- Conduct workplace health and safety training and provide necessary safety equipment. If relevant, address any specific health or accommodation needs of the employee.
- Introduce the employee to their team members and key stakeholders. If relevant, assign a mentor or buddy to support the new employee during their initial period. Establish a communication channel for feedback and ongoing support.
- Set up email accounts, access to relevant systems, and technology tools. Familiarise the employee with their workspace, including equipment and facilities. Ensure the employee knows how to access IT support for technical issues.
- Review job responsibilities, performance expectations, and goals. Provide access to any relevant manuals, guides, or training materials.
- Identify and schedule any necessary training or upskilling sessions.
- Communicate your business' mission, vision, and values if these are important to you.
- Discuss career development opportunities within the company if there are any relevant to the role.
- If relevant, introduce the employee to clients and explain customer service expectations.
- Explain the process for requesting time off and submitting leave applications.
- Share information about any employee assistance programs or support services.

- Review any confidentiality or non-disclosure agreements.
- Ideally, set up regular check-ins and performance review discussions.
- Outline the process for reporting workplace incidents or grievances.
- Discuss expectations for professional conduct and adherence to the code of conduct.
- Clarify dress code guidelines, if applicable.
- Ensure the employee understands the organisation's policy on working hours and breaks.
- Discuss any travel requirements or reimbursement processes, if applicable.
- Provide an opportunity for the employee to ask questions and seek clarification.
- Conclude the onboarding process by expressing appreciation for their contribution to the team.

Disclaimer: This checklist serves as a general guide. At FixHR we help our clients tailor the onboarding process to the specific needs of their business and comply with relevant employment laws and regulations in New Zealand.