



**PARISH
PRE-ARRIVAL CHECKLIST**

Congratulations on your new hire!

Soon you will be welcoming your newest employee to your team. This checklist will ensure that you are providing a welcoming environment, as well as a smooth transition for the team or department.

Administrative items:

- Send the employee a welcome letter/offer letter.
- Set up the new hire to attend orientation.
- Prepare set of new hire documents: common contacts, policy manual, org chart.
- Complete reference checks – suggested two professional references and most recent supervisor.
- Ensure employee has information about enrolling in Virtus to submit background check and register for initial safe environment training.
- Create personnel file.

Prepare workstation or workspace:

- Fully stock your employee's workplace with these suggested items:
 - o Paperclips, pens, pencils, stapler, post-its, scissors.
- Think about a welcome note/sign or a welcome plant for their first day!
- Name plate – if applicable

Phone set up:

- Set-up voicemail account
- Prepare guide for transferring calls, conference calls, voicemail set-up, etc.
- Prepare to discuss telephone etiquette/standards and coverage.
- Update website listing with employee's name and phone number.

Computer set up:

- Set-up new hire's computer with e-mail, and internet account privileges
- Software applications that are specific to the job.
- Schedule training with department administrators and staff on department systems, if applicable

Other onboarding preparations:

- Send an informal announcement/e-mail to your staff announcing the new hire and his/her background.
- Prepare the first day and first week agenda for new employee.
- Prepare “A day in the life...” description of a typical day for the new hire’s job
- Review calendar to schedule 1:1 meetings with each member of the team to meet with the new employee within the month.
- Gather all historical information from the predecessor, such as best practices, files, records, important contacts, and anything helpful to pass along to your new hire. The more you can do upfront to prepare, the more successful you and your new employee will be.
- Call the new employee and welcome him/her a few days before he/she starts work. Inform him/her of new hire orientation and confirm the date, time, and location of first day attendance. Send follow up confirmation email summarizing first day information.
- Set aside time to meet with the new employee within the first week of starting to review the job description roles and responsibilities, including other expectations and location specific operating instructions.