

HOW TO USE 'MY ONBOARDING CHECKLIST'

'My onboarding checklist' is a practical checklist of information and activities, broken into seven parts: My first day, My first 2 weeks, My first 2 months and My first three months, My first 4 months, My first 5 months and My first 6 months. It is designed to support line managers in welcoming new staff members and guiding them through the onboarding process.

You will have already completed the Pre-arrival checklist in 'Ready, Set, Go!' to get your new staff member ready for their first day. Follow these steps to set the onboarding experience by using the onboarding checklist.

Step 1 – Familiarise yourself with the checklist

Scan the checklist to familiarise yourself with the contents and determine which activities bare relevance.

Step 2 – Identify reference persons and resources

Identify a reference person and any resources for each activity on the checklist. List the names and resources on the checklist. If an activity is not relevant to the staff member, mark it as 'not applicable'.

Reference person – The reference person will be the line manager in the first instance. However, the line manager may identify other staff to address certain activities. These may include appropriate team members, the nominated buddy or subject matter experts. As a courtesy, you should approach these people to gain their agreement before nominating them on the checklist.

Resources – Some organisation wide resources have already been identified in the checklist. However, be sure to identify any local resources relevant to the staff member and your team (for example, a portfolio or unit work plan). Specify these on the checklist.

Step 3 - Complete and date checklist activities

Use the checklist to guide discussions with the new staff member from the first day through the first three months. The reference person for each activity should take time to meet with the new staff member and engage in active discussion using resources where applicable, simply supplying resources is not enough. Once completed, note the date on the checklist.

Step 4 – Sign and file the completed checklist

Once all checklist activities (over three months) have been completed, both the line manager and the new staff member sign it and return to HETI-HR for filing.

SET & GO - MY ONBOARDING CHECKLIST

Name: _____ Commencement Date: _____

Activity	Reference Person & Resources	Date Completed
Before my first day		
HETI Orientation Module Before commencing with HETI you should have already received the link and completed the HETI Orientation Module	Line Manager	
My first day		
Meet and greet new staff member	Line Manager	
Getting started <ul style="list-style-type: none"> ▪ Employees - assignment number, timecards, pay cycle details ▪ HETI-HR – contact in HR Team, Melanie Walker via HETI-HR@Health.nsw.gov.au for any questions. ▪ Contractors – timesheets, approvals and agency systems access ▪ Access passes / ID card, collected from 1RR Reception when advised available 	Line Manager <i>Pre-arrival Checklist</i>	
Computer Equipment <ul style="list-style-type: none"> ▪ Laptop and Headphones to be collected from Level 6 – IT Hub ▪ IT Hub will set up Laptop for New Starter with the following <ul style="list-style-type: none"> ○ Network Access ○ VPN Remote Access ○ Email ○ Access to HETI Intranet ○ W:\Drive ○ W:\Drive\MHP (MHP staff only) ○ H:\Drive (personal drive) ○ Follow me printing ○ MS Teams Softphone 		
Tour of Site <ul style="list-style-type: none"> ▪ Work area ▪ Zones ▪ Building security <ul style="list-style-type: none"> ○ Kastle App ▪ Emergency exits and evacuation meeting area ▪ Location of emergency equipment (e.g. fire extinguisher, first aid kit, defib) ▪ Facilities (e.g. Kitchens, bathrooms, stationery and printing rooms) ▪ Nearby amenities (e.g. bank, post office, food outlets) 	Line Manager and/or Buddy [insert name]	

1RR Familiarisation Site Tour Registered	Line Manager	
Introductions <ul style="list-style-type: none"> ▪ Email announcement to team of new staff member commencement ▪ Immediate colleagues ▪ Supervisors and subordinates ▪ Buddy ▪ Other key contacts (internal and external) ▪ Provide 'My Support Crew' summarising key contacts 	Line Manager and/or Buddy [insert name] <i>My Support Crew</i> <i>New Employee Announcement template</i>	
Welcome new staff member <ul style="list-style-type: none"> ▪ e.g. Morning tea, lunch with colleagues, etc 	Line Manager and/or Buddy [insert name] <i>Welcome email template</i>	
Emergency/WHS information <ul style="list-style-type: none"> ▪ Reporting accidents/injuries ▪ Identifying hazards 	Complete Module in MHL	
Online Modules – 1RR <ul style="list-style-type: none"> ▪ Emergency Procedures (5 mins - course code: 409280625) – including safety procedures and who to contact. ▪ Working Together (10 mins - course code: 409280695) – Learn to work in an agile, flexible & connected workplace, and understand the importance of workplace principles and etiquette to ensure a constructive and harmonious shared work environment. 	Complete Module in MHL	
Office Administration / Housekeeping <ul style="list-style-type: none"> ▪ Stationery ▪ Copying, printing and scanning facilities ▪ Corporate branding (templates, email signatures) ▪ Contact information (Lookup and Outlook) ▪ Setting up voicemail and answering the phone (phone on Teams) ▪ MS Teams video conferencing ▪ Shared Mailboxes ▪ Drives e.g. W:\Drive and H:\Drive ▪ Booking meeting rooms ▪ Mail procedure / express post / courier ▪ Booking Fleet Cars: <ul style="list-style-type: none"> ○ 1RR ▪ Vehicle allowance (requires pre-approval) ▪ Cab charge 	Line Manager and/or Buddy [insert name]	
HR Orientation New employees will be invited to a face-to-face orientation	Human Resources	
Terms and conditions <ul style="list-style-type: none"> ▪ Process for leave requests ▪ Procedures for calling in sick, late, etc. 	Line Manager	
Policy Directives Acknowledgement to be read and signed: <ul style="list-style-type: none"> ▪ Code of Conduct 	Line Manager	

<ul style="list-style-type: none"> ▪ Bullying – Prevention and Management of Workplace Bullying in NSW Health ▪ Conflicts of Interest and Gifts and Benefits ▪ Communications – Use and Management of Misuse of NSW Health Communications Systems ▪ Motor Vehicles – use of within NSW Health ▪ Travel – official ▪ Confidentiality Consent Form 		
<p>Dress standards</p> <p>Appropriate work attire, casual Fridays</p>	Line Manager	
<p>Required Attendance on Site</p> <ul style="list-style-type: none"> ▪ Team Days ▪ Full Time staff – 2 days per week ▪ Part Time (working up to 3 days per week) - 1 day per week 	Line Manager	
My first two weeks		
<p>Job role</p> <ul style="list-style-type: none"> ▪ Position description - key responsibilities and initial priorities ▪ Expectations and standards including the CORE values ▪ Overview of the Performance Development & Review System ▪ Workplace reporting relationships - portfolio / team organisation chart <p>Role Description available from ESS – eSigned Documents</p>	Line Manager <i>Position Description</i>	
<p>Probation</p> <p>6 months' probation period applies to all new staff to the NSW Health Service or people re-entering the service after an absence of 2 years or more.</p>	Line Manager	
<p>Probationary Performance Review</p> <ul style="list-style-type: none"> ▪ Set objectives ▪ Set dates for regularly review of performance ▪ Finalise process within the first 5 months (and provide documentation to Human Resources) ▪ Transition staff member to the annual PDR process 	Line Manager	
<p>Arrange Confirmation of Employment</p> <ul style="list-style-type: none"> ▪ On completion of Probationary review if applicable 	Human Resources	
<p>Provide regular and timely feedback</p> <ul style="list-style-type: none"> ▪ Set expectations sooner rather than later ▪ Positive feedback in a timely manner will reinforce the right behaviour. ▪ Regular catch up meetings to make sure your report has the 4 C's Content, Clarity, Connections & Culture 	Line Manager	
<p>Key organisational policies – follow up understanding</p> <ul style="list-style-type: none"> ▪ Code of Conduct and Ethical Behaviour ▪ CORE Values 	Line Manager	

<ul style="list-style-type: none"> ▪ ▪ Conflicts of Interest, Gifts and Benefits ▪ Communications policy (use of internet, email, etc) ▪ Work Health and Safety ▪ Equity and diversity ▪ Bullying – Prevention and Management of Workplace Bullying ▪ Grievance Procedure ▪ Employee Assistance Program (EAP) 		
<p>My Health Learning</p> <ul style="list-style-type: none"> ▪ Mandatory Training requirements and timeframes for completion: 11 core mandatory modules staged completion within the first 6 months of employment ▪ Learning and Development opportunities ▪ Provides access to LinkedIn Learning Courses 	Line Manager	
<p>Review HETI Delegations Manual</p>	Line Manager and/or Buddy [insert name]	
<p>Review relevant templates and forms</p>	Line Manager and/or Buddy [insert name]	
<p>Groups, meetings, networks and email lists</p> <ul style="list-style-type: none"> ▪ Make sure your new employee is signed up to the relevant groups, meeting invites, networks & email lists to make them feel welcome and to get up to speed 	Line Manager and/or Buddy [insert name]	
<p>Work plan for first three months</p> <ul style="list-style-type: none"> ▪ Assign first tasks (make it meaningful and look to provide a 'quick win' for the employee) ▪ Identify current priorities of the job ▪ Complete objective-setting part of Probationary Development Review form (5 months) 	Line Manager <i>My Career & Development</i> on the Intranet	
<p>Work Health & Safety training Identify the appropriate training:</p> <ul style="list-style-type: none"> ▪ Office environment ▪ Manual handling and lifting 	Line Manager	
<p>Core Chat – Living our Core Values</p> <ul style="list-style-type: none"> ▪ All staff within 3 months of commencing with HETI 	Line Managers	
<p>About HETI</p> <ul style="list-style-type: none"> ▪ Mission, vision, values ▪ Strategic Plan ▪ History and background ▪ Our culture ▪ Organisation structure 	Line Manager and Buddy [insert name]	

<ul style="list-style-type: none"> ▪ NSW Health context and determination ▪ HETI Annual Report and other important HETI publications ▪ Important NSW Health publications 		
Overview of new staff member's specific unit <ul style="list-style-type: none"> ▪ Portfolio Plan 	Line Manager and/or Buddy [insert name]	
Complete any systems training <ul style="list-style-type: none"> ▪ TRIM ▪ MS Teams Conferencing ▪ Procurement system, etc ▪ Service Now (Project Plan) ▪ StaffLink ▪ PAT (if not on Probation) 	Line Manager to organise	
My first two months		
Two months probationary review <ul style="list-style-type: none"> ▪ Meet and go through objectives ▪ Identify any gaps 	Line Manager <i>Probationary Review Form</i>	
Capability training <ul style="list-style-type: none"> ▪ Undertake any capability training identified to support success within first six months of commencement 	Line Manager	
My first four months		
Four months probationary review <ul style="list-style-type: none"> ▪ Meet and go through objectives ▪ Identify any gaps 	Line Manager <i>Probationary Review Form</i>	
Capability training <ul style="list-style-type: none"> ▪ Undertake any capability training identified to support success within first six months of commencement 	Line Manager	
My first five months		
Probationary Review finalised	Line Manager	
Performance Development and Review System Undertake training within first six months of commencement	Line Manager	
Prepare for Performance and Development Review	Line Manager	
My first six months		
Mandatory Training underway Mandatory training to be completed within first 6 months	Line Manager	

Please complete declaration

We have reviewed the above checklist and all aspects have been discussed and completed to our mutual satisfaction.

Manager's name: _____ Signature: _____

Date: _____

Employee's name: _____ Signature: _____

Date: _____

Once completed and signed, this checklist should be:

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| For employees: | Forwarded to HR for placement on the employee's personal file |
| For contractors: | Held by the line manager for the term of the contract and for reference should information be requested by the contracting agency. |
| For vendor staff: | Held by the manager responsible for the vendor contract and for reference should information be requested by the vendor. |