

Employment Law: How to Onboard a New Employee

by Beth C. Rogers, Esq.

After finding the right person for a position, employers must take appropriate steps to ensure the individual has a long future with the organization. Establishing a procedure for onboarding new employees will prepare them to succeed and motivate them to work hard.



The onboarding and orientation process educates new hires about the business, their position and their role in the overall structure of the organization. The long-term success of new employees is contingent upon a smooth transition into their new role.

As described below, employers should have a checklist of all the tasks that must be completed for each new employee.

Step 1: Prepare for the Arrival and Welcoming of the New Employee

Employers should make all necessary arrangements to ensure that a welcoming and structured environment awaits the new employee, including:

- Prepare a folder of new hire paperwork, which may include: Employment Eligibility Verification Form (Form I-9), income tax forms (e.g., W-4), direct deposit forms for compensation, benefit enrollment forms, retirement program enrollment forms, personal contact information sheet and emergency contact information sheet;

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- Arrange for all necessary equipment and supplies to be set up and/or available to the new employee, as well as stationery and business cards;
- Create an agenda for the new employee's first week of work, which includes meetings, training sessions and scheduled lunches with other employees in his or her department;
- Determine the new employee's job responsibilities and prepare a written description, which includes the position's primary tasks, work schedule, travel expectations and reporting protocol.

Step 2: Arrange for Appropriate Training, Work Assignments and Supervision

Employers should plan ahead to ensure that work assignments are ready for a new employee, and to arrange for any necessary training upon the employee's arrival, including:

- Coordinate with the appropriate supervisor to ensure his or her availability on the new employee's first day;

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"An intellectual is a man who takes more words than necessary to tell more than he knows."

- Dwight D. Eisenhower

"A conclusion is the place where you get tired of thinking.."

- Arthur Bloch

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- Identify and prepare work assignments for the new employee;
- Arrange for any training, such as computer and software, telephone, security, billing and time records, and office equipment, such as copy machines, fax machines, scanners, postage meters, etc.; and
- Arrange for and schedule any required compliance training, including training on harassment, discrimination, ethics, safety and conflicts of interest.

Step 3: Orient and Introduce the New Employee

Employers should spend the new employee's first day orienting him or her to the facility and introducing the new hire to other employees, including:

- Provide the new employee with a map of the facility, including all the exits, and a copy of the emergency evacuation policy;
- Supply any procedure manuals that may be essential for the performance of the employee's daily tasks;
- Prepare identification and security cards and provide any necessary keys or access codes;
- Assist the new employee with setting up voice mail and passwords for the various computer programs and systems he or she will be utilizing;
- Address any accommodation requests in consultation with legal counsel, and request any medical documentation necessary to consider whether the accommodation would impose an undue hardship on the employer

Step 4: Explain Employer Policies and Benefits

Employers should provide the new employee with a comprehensive overview of the employer's policies, procedures and benefit programs, including:

- Provide the new employee with a copy of the employee handbook and, if applicable, explain how to review the policies on the employer's intranet;
- Explain key policies and procedures, such as work schedule, dress code, absences, tardiness, payroll, holidays and prohibited workplace conduct;
- Review the procedures for requesting paid time off, including vacation time, sick days, personal days, bereavement leave and jury duty;

- Request that the new employee sign an acknowledgement form verifying that he or she received and read the employee handbook and understands that it is not a contract and that he or she is an at-will employee;
- Review the document retention policy, the confidentiality policy and security measures the employee should utilize to comply with the policy to ensure the integrity of the employer's proprietary information is preserved; the employer's grievance procedures and/or hotlines, which the new employee may utilize to the extent he or she has a question, concern or problem at work; and the employer's nonsolicitation, non-disclosure and noncompete agreements;
- Have the employee complete a consent form for a drug test



Step 5: Maintain a Successful Work Environment for the New Employee

Employers should monitor the new employee's transition into the job and take follow-up steps to ensure the new employee is receiving the necessary support to successfully perform, including:

- Check in regularly with the new employee and consider whether the new employee needs additional assistance or training;
- After 30 days, meet with the new employee's direct supervisor to discuss whether the employee is fulfilling the expectations of the position in a satisfactory manner;
- Conduct an onboarding survey after three months have elapsed, and modify the onboarding and orientation procedure and checklist as appropriate;
- Conduct a midyear review to provide employees with specific feedback regarding their performance, including areas where they need improvement and specific examples of deficient work product.