



# New Employee Onboarding Checklist

Congratulations on your new hire! Using this checklist will help your new employee get the tools and information needed to become a productive member of your team.

Begin using this checklist when you have an accepted job offer and have received the signed offer letter from the candidate.

## Onboarding Best Practices

- Supervisors should not be away from the office during the new employee's first week on the job.
- Supervisors should meet regularly with their new employee to review this checklist to identify what needs to be done or reviewed in the following week or month.
  - **Best Practice:** After saving a copy of this checklist to your Google Drive, share it with your new employee. This will enable both of you to have real-time access to the document. For instructions, see item 2 under Instructions and FAQs.
- It may be useful to introduce the new employee to a co-worker who can assist in times you are unavailable. You may want to involve the co-worker in some onboarding activities.
- There may be items unique to your division that you will need to add.

## Instructions and FAQs

1. **What type of worker is this checklist for?**
  - Use this onboarding checklist for new permanent and term-limited employees, this includes those new to state service and those transferring from another state agency (e.g. Colorado Department of Human Services).
2. **This document is view only. How do I get access so I can start using it?**
  - Step 1: Select 'File' and then 'Make a copy' and then select a location in your Google Drive to save it.
    - Note: Do not select the "Share it with the same people" box.
  - Step 2: Share the copy you just saved to your Google Drive with your new employee via their state email address.
3. **How do I mark an item as complete?**
  - Right click over the checkbox and select the checkmark
4. **How does my employee gain access to required compliance trainings?**
  - All required trainings will be assigned to the employee via the department's learning management system CO.TRAIN.
  - HR will create a CO.TRAIN account for the new employee by the end of your first week and the employee will receive an email from CO.TRAIN with their login information.
  - **Do NOT create a CO.TRAIN account for the new employee.** This causes hours of extra work for HR to fix.
5. **Who do I contact with technical assistance using this form?**
  - Human Resources at [cdphe.humanresources@state.co.us](mailto:cdphe.humanresources@state.co.us)
6. **What do I do when the checklist is complete?**
  - The supervisor and employee signs (Adobe signature or by hand) and submit to [cdphe.humanresources@state.co.us](mailto:cdphe.humanresources@state.co.us). To sign with Adobe, please click on "File" and then "Download" and select Adobe. From here, you'll be able to sign and save the file and then send to Human Resources.



# New Employee Onboarding Checklist

|                  |  |
|------------------|--|
| Employee Name:   |  |
| Supervisor:      |  |
| Job Title:       |  |
| Position Number: |  |
| Date of Hire:    |  |

| Pre-employment Phase ( <u>MINIMUM</u> 14 Days before Start Date) |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |            |
|------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| Done                                                             | Task                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Who        |
| <input type="checkbox"/>                                         | After the candidate accepts the job offer, notify PL and HR Business Partner of hire. PL will initiate an ePAF.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Supervisor |
| <input type="checkbox"/>                                         | Initiate an ePAF with the new hire's information.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | PL         |
| <input type="checkbox"/>                                         | <p>Log into the <a href="#">OIT Customer Service Portal</a> (best results using Google Chrome) and follow the OIT Onboarding and Offboarding guide to submit an onboarding request for your new employee. Make sure you have the following information ready:</p> <ul style="list-style-type: none"> <li>• Position number</li> <li>• Phone number</li> <li>• Desk location</li> <li>• Start date</li> <li>• List of needed network drives</li> <li>• Computer tag number (please see your BTL if unknown)</li> <li>• <a href="#">Signed Statement of Compliance</a> from the new employee</li> </ul> <p>After the onboarding ticket is submitted, an email is sent to the authorized approver and the authorized approver MUST APPROVE the request, even if it is the same person submitting the request.</p> <p><b><i>The OIT Statement of Compliance form that the employee returned with the offer letter needs to be attached. OIT requests this be completed 14 days prior to start date.</i></b></p> | Supervisor |
| <input type="checkbox"/>                                         | Complete a new <a href="#">Access Card and Parking Permit Request</a> (ACPPR) at least 1 week prior to employee's start date. The form requires vehicle information. Prior to completing the on-line form, contact the employee and request make, model, color, and License plate # of all vehicles the employee will drive to work. Enter this information into the form.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Supervisor |
| <input type="checkbox"/>                                         | Work with your division BTL to arrange for computer, phone, etc. Who's your BTL? Go to the CDPHE Intranet ( <a href="https://sites.google.com/a/state.co.us/cdpheintranet/">https://sites.google.com/a/state.co.us/cdpheintranet/</a> ), then Contacts, and select Technology Liaisons.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Supervisor |
| <input type="checkbox"/>                                         | Assign, clean, and prepare workspace and furniture. Order office supplies.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Supervisor |
| <input type="checkbox"/>                                         | Email staff introducing new employee and arrange an introduction meeting for the 1st week.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Supervisor |



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|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|
| <input type="checkbox"/> | <p>Plan for your employee to schedule an appointment with Human Resources on their first day to complete onboarding paperwork and provide I-9 and payroll documentation.</p> <ul style="list-style-type: none"> <li>The employee will receive an email via DocuSign from HR prior to their first day with instructions on how to complete all forms needed and a link to set up a 15 minute appointment slot with HR. Please confirm with your employee on what date/time they sign up for in HR.</li> </ul> | <b>Supervisor</b> |
|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|

| Day 1 - On the Job                                                                  |                                                                                                                                                                                                                                               |                   |
|-------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|
| Done                                                                                | Task                                                                                                                                                                                                                                          | Who               |
| <input type="checkbox"/>                                                            | Greet employee and show individual to his/her work location.                                                                                                                                                                                  | Division Specific |
| <input type="checkbox"/>                                                            | Complete the <a href="#">KRONOS Security Authorization Form</a> .                                                                                                                                                                             | Supervisor        |
| <input type="checkbox"/>                                                            | Attend your scheduled Onboarding session with HR with all required paperwork. Please call to reschedule if employee is missing any required paperwork - HR cannot onboard without required paperwork.                                         | Employee          |
| <input type="checkbox"/>                                                            | Employee view Onboarding presentation and email HR ( <a href="mailto:cdphe.humanresources@state.co.us">cdphe.humanresources@state.co.us</a> ) with verification of completion.                                                                | Employee          |
| <input type="checkbox"/>                                                            | Tour the work area, including restroom, cafeteria, mailroom and OHR.                                                                                                                                                                          | Division Specific |
| <input type="checkbox"/>                                                            | Introduce employee to managers and co-workers.                                                                                                                                                                                                | Division Specific |
| <input type="checkbox"/>                                                            | Review employee's work hours including breaks, lunch, etc.                                                                                                                                                                                    | Division Specific |
| <input type="checkbox"/>                                                            | Identify who the employee needs to call in case of absences.                                                                                                                                                                                  | Division Specific |
| <input type="checkbox"/>                                                            | Provide orientation to CDPHE computer system, software, intranet, and internet.                                                                                                                                                               | Supervisor or BTL |
| <input type="checkbox"/>                                                            | Outline the next few days so the employee knows what to expect.                                                                                                                                                                               | Division Specific |
| <input type="checkbox"/>                                                            | Obtain signature from the new employee on the Position Description, along with supervisor and appointing authority signatures, and send to the Division's Personnel Liaison (PL) for routing to HR.                                           | Supervisor        |
| <input type="checkbox"/>                                                            | Order name plate and business cards.                                                                                                                                                                                                          | Division Specific |
|  | Reminder: Employee must sign the Federal form I-9 document on his/her first day. Employee must have supplied OHR with I-9 documentation by his/her second day. If employee has not yet done so by the third day, OHR will terminate employee. | Employee          |

| First Week |      |     |
|------------|------|-----|
| Done       | Task | Who |



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|                                                                                     |                                                                                                                                                                                                                                                                                                                                                                                                                                             |                            |
|-------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------|
| <input type="checkbox"/>                                                            | Review information about the culture of CDPHE, including the strategic plan, organizational structure, code of conduct, and leadership on the <a href="#">About Us</a> page of the intranet.                                                                                                                                                                                                                                                |                            |
| <input type="checkbox"/>                                                            | Supervisor discuss protocol for handling and discussing confidential information with the employee.                                                                                                                                                                                                                                                                                                                                         | Supervisor and Employee    |
| <input type="checkbox"/>                                                            | Supervisor discuss the <a href="#">Ethical Principles and Code of Conduct</a> with employee and have employee sign and submit to <a href="mailto:cdphe.humanresources@state.co.us">cdphe.humanresources@state.co.us</a> .                                                                                                                                                                                                                   |                            |
| <input type="checkbox"/>                                                            | Supervisor and employee sign the <a href="#">Statement of Understanding</a> and submit to <a href="mailto:cdphe.humanresources@state.co.us">cdphe.humanresources@state.co.us</a> .                                                                                                                                                                                                                                                          | Supervisor and Employee    |
| <input type="checkbox"/>                                                            | Supervisor and employee complete the <a href="#">Conflict of Interest Disclosure Form</a>                                                                                                                                                                                                                                                                                                                                                   | Supervisor and Employee    |
| <input type="checkbox"/>                                                            | Travel Orientation (if applicable) at <a href="https://sites.google.com/state.co.us/cdpheintranet/department-services/financial-services/travel-and-vehicles">https://sites.google.com/state.co.us/cdpheintranet/department-services/financial-services/travel-and-vehicles</a> <ul style="list-style-type: none"> <li>• State Travel Card</li> <li>• Reimbursement procedures</li> <li>• Phone card</li> <li>• Fleet procedures</li> </ul> | Division Specific          |
| <input type="checkbox"/>                                                            | If warranted, meet with Division's fiscal officer to review purchasing procedures                                                                                                                                                                                                                                                                                                                                                           | Fiscal Officer             |
| <input type="checkbox"/>                                                            | Review <a href="#">OIT Customer Service Portal User Guide</a>                                                                                                                                                                                                                                                                                                                                                                               | Employee                   |
| <input type="checkbox"/>                                                            | Review <a href="#">Safety and Security information</a> .                                                                                                                                                                                                                                                                                                                                                                                    | Division Specific          |
| <input type="checkbox"/>                                                            | Set up telephone and review telephone user guide. ( <a href="https://www.cisco.com/c/en/us/td/docs/voice_ip_comm/cuipph/8800-series/english/user-guide/P881_BK_C3A802A0_00_cisco-ip-phone-8800-user_guide.html">https://www.cisco.com/c/en/us/td/docs/voice_ip_comm/cuipph/8800-series/english/user-guide/P881_BK_C3A802A0_00_cisco-ip-phone-8800-user_guide.html</a> )                                                                     | Division Specific          |
| <input type="checkbox"/>                                                            | Review email and mail procedures                                                                                                                                                                                                                                                                                                                                                                                                            | Division Specific          |
| <input type="checkbox"/>                                                            | Get picture taken for ID card. Access card photos are taken in the ID Badge room on the 1st floor of Building B on Mondays and Thursdays at 3 p.m. to 4 p.m. Along with the employee ID badge, parking permits will be issued to the employee the same day.                                                                                                                                                                                 | Division Specific/Employee |
| <input type="checkbox"/>                                                            | KRONOS orientation with Division timekeeper.                                                                                                                                                                                                                                                                                                                                                                                                | Employee/Time-keeper       |
| <input type="checkbox"/>                                                            | After you receive a welcome email from HR with all of the required training for your worker status, please login to <a href="#">COTRAIN</a> and update your password and complete your assigned training.<br><i>Note: DO NOT CREATE A CO.TRAIN ACCOUNT FOR ANY WORKER. HR will create a CO TRAIN account for you by the end of your first week and you will receive an email from CO TRAIN with your login information.</i>                 | Employee                   |
|  | Reminder: Employee must have supplied OHR with I-9 documentation. If employee has not yet done so, OHR will terminate employee.                                                                                                                                                                                                                                                                                                             | Employee                   |

## Within first month on the job

| Done | Task | Who |
|------|------|-----|
|------|------|-----|



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|  |                                                                                                                                                           |                         |
|--|-----------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------|
|  | Reminder: New employees must sign up for benefits within 31 days of hire.                                                                                 | Employee                |
|  | Reminder: Within 60 days of hire, employee's PERA/Retirement choice must be made.                                                                         | Employee                |
|  | PME and PEPS Reward System orientation, including a review of the performance plan in PME which the employee needs to sign.                               | Supervisor/<br>Employee |
|  | Review <a href="#">CDPHE Professional Development and Training</a> and <a href="#">Department of Personnel and Administration</a> training opportunities. | Employee                |
|  | Review information on the <a href="#">CDPHE intranet</a> including About Us, Employee Resource Groups, Services, and News and Events.                     | Employee                |
|  | Complete the New Hire Training plan assigned to the new <a href="#">COTRAIN</a> account under YOUR LEARNING and then YOUR TRAINING PLANS.                 | Employee                |
|  | Take HIPAA training (if applicable to your position). CO TRAIN course ID 1030967                                                                          | Employee                |
|  | Take Contract Management training (if applicable to your position). COTRAIN course ID 1097436                                                             | Employee                |

| Within first 90 days on the job |                                                                                                                                                                                                                                            |            |
|---------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|
| Done                            | Task                                                                                                                                                                                                                                       | Who        |
|                                 | Sign up for and attend the Health Equity and Environmental Justice 101 training. Sign up through the <a href="#">Professional Development training calendar</a> . (This can be completed virtually or online through your COTRAIN account. | Employee   |
|                                 | Review <a href="#">CDPHE policies</a> including any Division-specific policies provided by your Supervisor.                                                                                                                                | Employee   |
|                                 | Complete the <a href="#">Reasons for Selecting CDPHE as Your Employer</a> survey                                                                                                                                                           | Employee   |
|                                 | Submit the completed and signed checklist to <a href="mailto:cdphe.humanresources@state.co.us">cdphe.humanresources@state.co.us</a>                                                                                                        | Supervisor |

By signing below, I attest that I have completed all of the above on-boarding activities.

|                    |                       |      |
|--------------------|-----------------------|------|
|                    |                       |      |
| Employee Signature | Employee Printed Name | Date |

By signing below, I verify the employee has completed all of the above onboarding activities.

|                      |                         |      |
|----------------------|-------------------------|------|
|                      |                         |      |
| Supervisor Signature | Supervisor Printed Name | Date |



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