

## NEW EMPLOYEE ONBOARDING CHECKLIST

### 1. Build a solid foundation in week one

<b>Set a schedule</b>	<p>Schedule times for:</p> <ul style="list-style-type: none"> <li>• Introductions</li> <li>• Training</li> <li>• Benefits</li> <li>• A tour of the facilities</li> </ul>
<b>Set up accounts and create logins</b>	<ul style="list-style-type: none"> <li>• Ensure your employee has access to the tools they need to perform their job</li> </ul>
<b>Conduct training</b>	<p>Organize training for:</p> <ul style="list-style-type: none"> <li>• Organizational culture</li> <li>• Job-specific responsibilities</li> <li>• Data security</li> <li>• Other organizational policies</li> </ul>
<b>Keep records</b>	<ul style="list-style-type: none"> <li>• Sign documents on time</li> <li>• Keep detailed records</li> </ul>
<b>Complete forms</b>	<ul style="list-style-type: none"> <li>• <i>Form W-4</i></li> <li>• <i>Form I-9</i></li> <li>• Direct deposit form</li> <li>• Emergency contact form</li> </ul>
<b>Define points of contact</b>	<ul style="list-style-type: none"> <li>• Provide a key point of contact's phone number and email address</li> </ul>

### 2. Demonstrate care with a health plan and other protection

<b>Explain options and meet deadlines for enrollment</b>	<ul style="list-style-type: none"> <li>• Explain benefits options available for health, <a href="#">life</a>, accident, <a href="#">disability</a>, dental and vision coverage</li> <li>• Emphasize deadlines for enrollment</li> </ul>
<b>Educate</b>	<ul style="list-style-type: none"> <li>• Present details about wellness programs and benefits available through the health plan</li> <li>• Explain the importance of life and disability coverage</li> <li>• Teach employees how to access accounts for their health care and other coverage</li> </ul>
<b>Offer tools</b>	<ul style="list-style-type: none"> <li>• Provide tools such as a <a href="#">life coverage calculator</a> or <a href="#">disability coverage calculator</a> to help employees determine how much coverage they need</li> </ul>

### 3. Invest in your employees' future with a retirement plan

<b>Enroll an employee in a retirement plan right away</b>	<ul style="list-style-type: none"> <li>• <a href="#">Enroll</a> through automatic enrollment or complete an onboarding packet</li> </ul>
<b>Provide employer-matching contributions</b>	<ul style="list-style-type: none"> <li>• Explain your <a href="#">employer matching options</a></li> </ul>
<b>Educate employees</b>	<ul style="list-style-type: none"> <li>• <a href="#">Explain the difference</a> and advantages between tax-sheltered and Roth contributions</li> <li>• Make them aware of their <a href="#">investment options</a></li> <li>• Explain the <a href="#">importance of saving</a></li> <li>• Offer tools to <a href="#">show how contributions add up</a></li> <li>• Encourage <a href="#">annual contribution increases</a></li> <li>• Help pastors <a href="#">designate minister's housing allowance</a> before the new year</li> </ul>

## 4. Be proactive in protecting your people and your ministry

<b>Have <a href="#">employment practice liability (EPL) insurance</a></b>	<ul style="list-style-type: none"> <li>Guard your ministry against potential lawsuits related to alleged sexual harassment, unlawful termination, or an error in benefits administration</li> </ul>
<b>Communicate job responsibilities</b>	<ul style="list-style-type: none"> <li>Set clear expectations, duties and responsibilities</li> </ul>
<b>Review and sign an <a href="#">anti-harassment and discrimination policy</a></b>	<ul style="list-style-type: none"> <li>Define inappropriate behavior and its consequences</li> </ul>
<b>Review and sign a data security policy</b>	Educate employees on: <ul style="list-style-type: none"> <li>Identifying scams</li> <li>Safe ways to share data</li> <li>Other practices to <a href="#">manage data security</a></li> </ul>
<b>Review and sign a confidentiality agreement</b>	<ul style="list-style-type: none"> <li>Specify what organizational information must be kept confidential</li> </ul>
<b>Review and sign other organization policies</b>	Clearly define: <ul style="list-style-type: none"> <li>Attendance requirements</li> <li>Work schedules</li> <li>Disciplinary action</li> <li>Grounds for termination</li> <li>Complaint procedures</li> <li>Other policies necessary for your organization</li> </ul>

## 5. Guide future development

<b>Set goals</b>	<ul style="list-style-type: none"> <li>Develop short- and long-term goals</li> <li>Schedule evaluation times</li> </ul>
<b>Offer professional development</b>	<ul style="list-style-type: none"> <li>Map out professional development opportunities to grow employees' skills and confidence</li> </ul>
<b>Schedule check-ins</b>	<ul style="list-style-type: none"> <li>Regularly ask how employees are doing — not just regarding goals or tasks — but how they feel about their job</li> <li>Address problems early on to help improve retention</li> </ul>
<b>Request feedback</b>	<ul style="list-style-type: none"> <li>Ask new employees about their experience with the onboarding process</li> <li>Implement changes to benefit future new hires</li> </ul>

## Financial services and insurance solutions for every season of ministry™

For more information, contact us at [Info@GuideStone.org](mailto:Info@GuideStone.org) or **1-888-98-GUIDE** (1-888-984-8433), Monday through Friday, from 7 a.m. to 6 p.m. CT.

This checklist is for informational purposes only. It is not intended to be construed as legal advice. Readers should use this article as a tool, along with best judgment and any terms or conditions that apply, to determine appropriate policies and procedures for your church's risk management program.