

New Employee Remote Onboarding Checklist (Manager Version)

Effective employee onboarding has a direct impact on employee engagement and retention. Effective onboarding taps into the excitement and good feelings a candidate had about a company and extends those emotions into high employee engagement and high performance. Onboarding remote workers requires extra effort by leaders, and this guideline will help leaders implement best practices.

Employee Name: _____
Department: _____

Start Date: _____
Manager: _____

Pre-Start Date Action Items

HR

Contact: Local HR

- ☐ Ensure Welcome Email was sent to the New Hire
- ☐ Collaborate with HR to ensure plans are in place to conduct the following Orientations: Benefits, Safety, local/BU policies, time and absence tracking

Office (to occur when working onsite)

Contact: Local Facilities

- ☐ Cubicle/office assigned: _____
- ☐ Office/guest chairs provisioned
- ☐ Office name plaque ordered
- ☐ Office supplies provided
- ☐ Office/desk drawers cleaned and emptied

Workstation Equipment (To be Mailed to New Employee)

Contact: Local IT/[IT Service Desk](#)

- ☐ Submit a Request for needed Computer Hardware/Software and Cell Device. Normal processing is 7-10 days; build in an extra 1-2 days for shipping. Maintain close contact with IT to ensure shipment of equipment and ask your new employee to confirm receipt of equipment prior to their first day.
- ☐ Laptop/desktop assigned: Asset number: _____
- ☐ Monitors, Keyboard, Mouse provisioned
- ☐ Printer/Copier set up

Telephone Equipment (to occur when working onsite)

Contact: Local IT/[IT Service Desk](#)

- ☐ Desktop Phone requested/set up
- ☐ Voicemail set up (confirm that your new employee has completed this step)
- ☐ Cell phone requested/set up (if applicable)

Account Access

Contact: [IT Service Desk](#)

- ☐ Computer access Login credentials: _____
- ☐ Email account Account name: _____
- ☐ Shared drive access Login credentials: _____
- ☐ Special Software
- ☐ Add your employee to any needed distribution lists, shared mailboxes or Teams sites.
- ☐ Identify any additional BU, site, or department specific drives or sites that request an access request

Pre-Start Date Action Items

Other To-Dos

- ☐ Work with HR to prepare and get any necessary approvals for a new employee organizational announcement.
- ☐ Determine who can serve as Onboarding Buddy for the new hire
 - Ask a member of the team to schedule daily meetings for the first week and then regular meetings thereafter
 - Buddies should have assigned topics to cover with the new employee and should be tasked with helping the employee on a day-to-day basis with quick questions and guidance about the team and company culture
- ☐ Create an Onboarding schedule for the employee's first week including:
 - WEBEX with IT on first day to ensure proper set up of all equipment and all accounts including Jabber and WEBEX
 - If possible, arrange a virtual tour of their working space at the office
 - Introduction to Onboarding Buddy with outline of assigned topics
 - Introduction to all key contacts and stakeholders in the first 1-2 weeks
- ☐ Send the new employee a welcome email (to their personal email) 3-5 days before the start date
 - Confirm their start date and lay out the Onboarding schedule for their first days/week.
- ☐ After the employee's email account has been established, send a welcome email with the Onboarding Schedule to their Emerson address
 - Send meeting notices for their first week orientation meetings.
- ☐ Make sure your entire team has photos in their WebEx account
 - [Add a photo to WebEx](#) , which will help foster team connection

First Day Action Items

IT

Contact: Local IT/[IT Service Desk](#)

- ☐ Ensure first day WebEx with IT is conducted and that all equipment and accounts are set up.
- ☐ Check to ensure employee has been added to distribution lists, shared drives, shared mailboxes.

HR

Contact: Local HR

- ☐ Ensure the employee meets with HR for I-9 completion and first-day policy review
- ☐ Collaborate with HR to ensure a review occurs of all local/BU/Corporate policies

Other To-Dos

- ☐ Do a virtual "round the room" introduction with the entire team via WebEx
- ☐ If possible, conduct the virtual tour of the building and workspace
- ☐ Discuss [Emerson Values](#)
- ☐ Ensure that the Onboarding Buddy aligns with the new team member on the first day to begin discussion of assigned topics.
- ☐ Check in at the end of the day to see how the day went and answer any questions
 - Review the plans for the rest of the week.
- ☐ Review the [New Employee Remote Onboarding Checklist](#) with the employee and make the necessary plans to complete First Week Action Items

First Week Action Items**Account Access****Contact: iExpense Administrator**

- ☐ If the employee will travel for business, initiate corporate credit card application, iExpense, and GetThere set-up.

HR**Contact: Local HR**

- ☐ Ensure the employee meets with HR to review any questions about Benefits enrollment

Other To-Dos**Set Expectations**

- ☐ Conduct daily check ins with the employee for the first week
- ☐ Discuss hours of work and expectations
 - While expressing your trust in their professionalism, establish a clear understanding about hours of work, discuss any signal you expect when the employee begins/ends their day, align on any communication should occur if there are deviations from working hours
- ☐ Discuss expectations around use of Jabber
 - This includes how and when to use Jabber
- ☐ Discuss tracking process for taking vacation, sick leave, and personal days
- ☐ Discuss department mission and goals, job duties, ongoing projects, and performance expectations
 - Share your goals and encourage new employee to begin drafting their own performance and development goals for the [Performing & Developing Planning Process](#).
- ☐ Set ongoing 1-on-1 meetings to discuss progress against goals and development
 - Communicate your expectations for how these meetings will be conducted: format of any progress reports, when reports will be sent, etc.

Build Awareness of the BU/Department Culture

- ☐ Discuss your style preferences and the new employee's: best ways to communicate, best times to schedule meetings, etc.
 - Provide insights as to the preferences of other key stakeholders.
- ☐ Discuss your leader's likes/preferences/focus areas.
- ☐ Discuss any department or BU projects/priorities that are important for awareness.
- ☐ If the employee will be a participant in any of Emerson's unique business processes (org review, profit review, etc.) provide an overview of the process and examples from past meetings.

Enable Team Camaraderie

- ☐ Conduct "virtual" lunches or happy hours with the team
- ☐ Many of us have "co-workers" in our home environments
 - Invite the remote team to share photos of their tiny or 4-legged co-workers, which creates a sense of connectivity to co-workers
- ☐ Look for opportunities to partner your new employee with strong performers for projects or initiatives.
- ☐ Ensure inclusivity of remote employees in all activities
 - Make sure your new team member is included on all meetings where they should be participants.
 - Double check any reoccurring meetings to add your new employee.
- ☐ Review to determine whether there are additional introductions needed with key stakeholders.
- ☐ Encourage connection across your team
 - The Microsoft Teams platform can assist with encouraging dialogue and sharing files across the team. Learn about setting up a [Private Channel](#) for your team
- ☐ At the end of the week review the [New Employee Remote Onboarding Checklist](#) and answer any questions.

First Month Action Items**HR****Contact: Local HR**

- ☐ Ensure the employee meets with HR to review any final questions about Benefits enrollment. Remind employee that to maintain enrollment of any dependents they must provide dependent certification documents to HR.

Account Access**Contact: iExpense Administrator**

- ☐ If the employee will travel for business, verify corporate credit card has been issued and iExpense/GetThere set-up is complete

Other Tasks**E-Learning, Training & Development**

- ☐ Answer any question your employee may have about the Global Learning Center site. Ensure the employee completed all assigned GLC training
- ☐ Ensure that the employee completed review of the Ethics Handbook. Discuss any questions.

Setting Expectations

- ☐ Finalize performance and development goals for the [Performing & Developing Planning Process](#). Ensure the goals have been entered in OracleHCM.
- ☐ Ensure ongoing 1-on-1 meetings to discuss progress against goals and development are occurring.
- ☐ Review the [New Employee Remote Onboarding Checklist](#) First Month Tasks and answer any questions. Make necessary plans to complete First Month Action Items and agree on new timeframes if necessary.

Onsite Orientation**Upon Commencement of Onsite Work**

- ☐ Pre-First Day:
 - Inform your employee about the dress code and parking arrangements.
 - Ensure your new employee is set up for a badge.
 - Review site safety/security policies.
 - Do a final check to ensure workstation is set up and general office supplies at the workstation.
- ☐ First Day:
 - Ensure a tour of the essentials: coffee, restroom, kitchen/breakroom/vending machines, smoking area, first-aid kit, defibrillator, conference room booking, etc.
 - If the employee completed their I-9 remotely, ensure that they connect with HR immediately to provide visual inspection of documents.

Important Contacts (Complete This for Your New Employee)

Requests	Contact	Email, Phone, Link
Benefit Questions		Email:
Business Cards		Email:
Cell Phone		Email:
Corporate Credit Card	iExpense Administrator	Email:
Equipment (Desktop, Laptop, docking station, cell phone etc.)	IT Help Desk 1-866-457-4877	Email: IT Service Desk
Fleet Vehicle	Jenny Kolstad	Email: Jenny.Kolstad@Emerson.com
HR Questions		Email:
IT Help Desk	IT Help Desk 1-866-457-4877	Email: IT Service Desk
Matching Gift Program		Matching Gift Program
Payroll Questions		Email:
Retirement - Vanguard		1-800-523-1188 https://investor.vanguard.com
Security		
Supplies Ordering		