

QuickBooks' new hire orientation checklist

Provide basic information about your business

- Mission statement and values
- Company history
- Team size
- Products and services
- Key customers

Complete new hire paperwork

- Form I-9
- Form W-4
- Any new hire notices your state requires
- Direct deposit enrollment
- Emergency contact information
- Benefits enrollment
- Company procedures or employee handbook

Explain and enroll in benefits

- Medical insurance
- Vision insurance
- Dental insurance
- Disability insurance
- Retirement savings plan
- Paid time off
- Other perks

Make introductions with key personnel

- Managers and supervisors
- Team members
- Vendors and suppliers

Conduct an office tour

- Bathrooms
- Break room
- Supplies storage
- Equipment (printer, scanner, etc.)
- Entrances and exits
- Departments and areas

Complete IT setup

- Computer access
- Email address
- Phone system
- Building access card
- Software access

Plan social and hands-on elements

- Team lunch or happy hour
- Icebreaker or get-to-know-you activities
- Hands-on job training or job shadows

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