



# Virtual Onboarding Checklist

Whether a law firm, global organization or a small business, when faced with onboarding a remote employee, you can set expectations, start building relationships and instill a sense of company culture by following this checklist:

## COMPLETING PAPERWORK: HUMAN RESOURCES

- **Schedule a video conference for day one** using video call app or software to welcome your new hire to the team and provide initial instructions. Consider scheduling the call for a quarter after the hour as there tend to be an influx of video calls that start on the hour and can cause delays and disruption to connectivity.
- **Send documents that need signatures using DocuSign or HelloSign.** DocuSign even allows for notarization of documents, if necessary.
- **Handling I-9 verifications:** According to the Department of Homeland Security, “Employers with employees taking physical proximity precautions due to COVID-19 will not be required to review the employee’s identity and employment authorization documents in the employee’s physical presence. However, employers must inspect the Section 2 documents remotely (e.g., over video link, fax or email, etc.) and obtain, inspect, and retain copies of the documents, within three business days for purposes of completing Section 2. Employers also should enter ‘COVID-19’ as the reason for the physical inspection delay in the Section 2 Additional Information field once physical inspection takes place after normal operations resume. Once the documents have been physically inspected, the employer should add “documents physically examined” with the date of inspection to the Section 2 additional information field on the Form I-9, or to section 3 as appropriate. These provisions may be implemented by employers for a period of 60 days from the date of this notice OR within 3 business days after the termination of the National Emergency, whichever comes first.”

## GETTING SET UP: EQUIPMENT AND IT

- **Choose how you would like your new hire to obtain equipment** so that they are ready to go on day one:
  - › **Ship all of their equipment to their home** at least a week before their start date along with detailed instructions on how to get set up. Use FedEx so you can track the package and confirm delivery times and guarantees.
  - › **Provide access to your company’s virtual desktop infrastructure (VDI)** so your new hire can use their own equipment and then nothing needs to be shipped. A complete VDI is the best solution for security, especially when paired with multi-factor authentication.
  - › **Send the new hire a check to purchase their own equipment,** include specifications and requirements.
- **Set up a call with IT on day one** to make sure all software and systems are up and running appropriately.
- **Provide guidance on how to connect** work email, voicemail and other systems to your new hire’s personal phone in a secure manner.



## PROVIDING THE TOOLS FOR SUCCESS: SYSTEMS AND APPS

- **Share a list of the core tools and apps** integral to the functions of your organization when the new hire starts.
- **Create shared workspaces using project management software** such as Asana, Tello, Sharepoint and Office365 where your team can track project statuses and access shared documents.
- **Introduce instant messaging programs** that enable real-time communication via chats and instant messages with colleagues. This allows for better collaboration among colleagues and helps teammates get to know each other and stay in touch.
- **Encourage remote employees to turn off Alexa or Google Home** especially when discussing confidential matters. These devices are constantly recording and monitoring sound within their surroundings and you do not want them picking up on highly sensitive information.

## CREATING CULTURE

- **Put together a care package** that includes what you'd give a new hire if they were in the office, whether that's a mug, pen or t-shirt. Let them know they are a part of the team and welcome.
- **Set clear goals and expectations.** Whether in the same time zone or not, make sure your new hire knows when you expect him or her to be available for meetings. Explain how your team communicates whether they solely rely on phone and email or if they mix in instant messaging and video chatting as well. Discuss how team members share files and information and outline communication protocols. Make sure they are aware of the workflow, organizational values, business goals and performance expectations.
- **Schedule a team meeting and add the new hire to any regular meetings.** Use videoconferencing so everyone can see each other, which will help everyone feel more connected even at a distance and connecting the face to a voice will help build a strong relationship. They will also be able to stay up-to-date on their colleagues' project statuses and work progress.
- **Take virtual tours of each other's workspaces.** Start your first virtual meeting with each team member giving a tour of their workspace, taking in their surroundings. Being aware of your team's surroundings will allow for a greater sense of understanding and lessen feelings of isolation.
- **Email out a welcome email to the organization.** Encourage colleagues to write back to welcome the new hire and set up one-on-one calls and video chats to welcome them into the family.
- **Connect the new hire with a mentor** who can show them the ropes, introduce him or her to the culture and service as a support person as they acclimate to the organization. Let them know this person is there to answer questions to point them in the right direction.
- **Set up reoccurring one-on-one meetings** with your new hire. As a manager, you should be in regular contact with your remote team members to make sure they are on task and receiving feedback. Also, this will help them feel connected to the team and add to strengthening your relationship.