

Onboarding Experience Assessment Checklist

This tool, while not all inclusive, is designed to help leadership determine if there are opportunities for improvement related to the onboarding experience.

1. Application & Hiring Process

- Application process is easy and mobile-friendly
- Timely communication after application submission
- Clear job expectations provided upfront
- Interview process is respectful and organized
- Offer communication is timely and clear

2. Pre-Boarding (Before Day One)

- New hire receives welcome communication
- Clear instructions for first day (location, time, dress code)
- Schedule provided in advance
- Paperwork completed before the first day when possible
- Point of contact identified for questions

3. Orientation Experience

- Orientation agenda is structured and followed
- New hires are welcomed and introduced to the team
- Content is relevant to role (not just compliance-heavy)
- Opportunity for questions and interaction
- Technology and access set up correctly

4. First Week Experience

- Assigned a trained preceptor/mentor
- Clear expectations for daily responsibilities
- Consistent schedule provided
- Regular check-ins by supervisor
- New hire feels supported and not overwhelmed

5. First 30-90 Days

- 30/60/90-day check-ins conducted
- Feedback collected from new hires
- Skills competency validated
- Recognition provided for milestones
- Career pathway or growth opportunities discussed

Onboarding Experience Assessment Checklist

6. Overall Experience

- Onboarding is consistent across departments
 - Training aligns with real job demands
 - Communication is clear and timely
 - New hires feel valued and engaged
 - Process is continuously improved based on feedback
-

Caregiver Experience

First Day Experience

- Was the first day organized and structured? (Yes/No)
- Did the employee know where to go and what to expect? (Yes/No)
- Were introductions made to team members? (Yes/No)
- What worked well?
- What could be improved?

First Week Experience

- Was a preceptor consistently assigned? (Yes/No)
- Were expectations clearly explained? (Yes/No)
- Did the employee feel supported? (Yes/No)
- What challenges did the employee experience?
- What support would have helped?

First 30 Days

- Was a 30-day check-in completed? (Yes/No)
- Are core competencies developing appropriately? (Yes/No)
- Is the employee engaged and participating?
- What feedback has the employee provided?
- What barriers exist?

60-Day Progress

- Was a 60-day check-in completed? (Yes/No)
- Is the employee gaining confidence in role? (Yes/No)
- Are performance expectations being met? (Yes/No)
- What additional training is needed?
- What retention risks are present?

90-Day Milestone

- Was a 90-day review completed? (Yes/No)
- Is the employee fully onboard and independent? (Yes/No)
- Has the employee expressed intent to stay? (Yes/No)
- What recognition has been provided?
- What growth opportunities have been discussed?