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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