Faulkner HR Solutions Onboarding Checklist

A 90-Day Guide for Managers and HR Leaders

Redesigning the Way Organizations Grow

Introduction

Effective onboarding is one of the most critical factors in retaining employees and driving early success. This checklist is designed for managers and HR leaders to prepare, integrate, and support new hires through their first 90 days. Use it as a step-by-step guide to ensure every stage of onboarding builds compliance, connection, and confidence.

Your Next Step in Building Retention-Driven HR

Faulkner HR Solutions partners with organizations to design onboarding systems that align talent with mission.

To customize this checklist for your team, visit https://www.faulknerhrsolutions.info or contact Dr. Thomas Faulkner, SPHR, LSSBB.

The Faulkner HR Solutions Comprehensive Onboarding Framework

Introduction: Getting Started

A holistic guide to ensure new hires are compliant, capable, connected, and committed. This framework prepares the manager, integrates the employee, and aligns their role with the company's mission for maximum impact and retention.

Phase 0: Manager & Team Preparation (Pre-Boarding)

Focus: Prepare the environment for the new hire. An unprepared manager is the #1 point of failure in onboarding.

Task	Responsible Party	Due Date	[ ]
Finalize the 30-60-90 day plan with clear goals	Manager	1 Week Before Start	☐
Schedule all recurring check-ins (Week 1, 30, 60, 90-day)	Manager	1 Week Before Start	☐
Inform the team of the new hire's name, role, and start date	Manager	3 Days Before Start	☐
Identify and prepare a "quick win" project	Manager	3 Days Before Start	☐
Assign a Buddy/Mentor and provide them with the "Buddy Guide"	Manager	3 Days Before Start	☐
Coordinate with IT to ensure all equipment/access is ready	Manager	3 Days Before Start	☐
Clean and prepare the physical or virtual workspace	Manager	1 Day Before Start	☐
Prepare a welcome kit (company swag, welcome note, agenda)	Manager / HR	1 Day Before Start	☐

Phase 1: Day 1 – Week 1 (Compliance, Connection & Role Foundations)

Focus: *Handle critical logistics, establish a sense of belonging, and provide the foundational knowledge for the role.*

Task	Responsible Party	Due Date	[ ]
Signed offer letter, I-9, W-4, and payroll forms completed	HR / New Hire	Day 1	☐
Benefits & retirement plan enrollment initiated	HR / New Hire	By Day 5	☐
Handbook & policy acknowledgments signed	HR / New Hire	By Day 5	☐
Equipment setup and system logins confirmed working	IT / Manager	Day 1	☐
Required compliance training assigned (e.g., safety, harassment)	HR / Manager	Day 1	☐
Welcome announcement sent to the wider team/company	Manager	Day 1	☐
Team introductions and workspace tour (physical/virtual)	Manager	Day 1	☐
Meet with Buddy/Mentor to cover "unwritten rules"	Buddy / Mentor	Day 1	☐
Team welcome lunch or coffee chat	Manager / Team	Week 1	☐
Review role, KPIs, and the 30-60-90 day plan	Manager	Week 1	☐
Session: "How this role drives the company mission"	Manager	Week 1	☐
Introduction to job-specific workflows & key tools	Manager / Peer	Week 1	☐
Assign the "quick win" project	Manager	Week 1	☐

Phase 2: First 30–90 Days (Integration, Development & Performance)

Focus: *Transition from learning to performing, fostering growth, and building a cross-functional network.*

Task	Responsible Party	Due Date	[ ]
Initial Individual Development Plan (IDP) discussion	Manager	By Day 30	☐
Introduction to learning resources (LMS, workshops, etc.)	Manager / HR	By Day 30	☐
Career pathway conversation (long-term growth opportunities)	Manager	By Day 90	☐
Job shadowing or side-by-side coaching session	Peer / Mentor	By Day 30	☐
Schedule intro meetings with 2-3 key cross-functional stakeholders	Manager / New Hire	By Day 60	☐
Networking opportunity with a senior leader	Manager	By Day 90	☐
Scheduled 30-day check-in and feedback session	Manager	By Day 30	☐
Scheduled 60-day check-in and feedback session	Manager	By Day 60	☐
Formal 90-day performance review	Manager	By Day 90	☐
Engagement pulse survey sent to new hire	HR	By Day 90	☐
Recognition of early contributions (public or private)	Manager / Team	Ongoing	☐

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FLSA Exemption Classification Checklist

Practical Compliance Tool – Updated for Nov. 2024 Rulings

Redesigning the Way Organizations Grow

UNDER THE FEDERAL FAIR LABOR STANDARDS ACT (FLSA)

This guide outlines the general rules governing exemptions from minimum wage and overtime pay under the **Fair Labor Standards Act (FLSA)**.

The FLSA requires that most employees in the United States receive:

- At least the federal minimum wage for all hours worked, and
- Overtime pay at **time and one-half the regular rate** for all hours worked over 40 in a workweek.

However, the FLSA also provides specific exemptions from both minimum wage and overtime requirements. These exemptions apply to employees employed in bona fide:

- **Executive** roles
- **Administrative** roles
- **Professional** roles (including learned and creative professionals)
- **Computer-related** positions
- **Outside sales** positions

To qualify for exemption, employees must generally satisfy two conditions:

1. **Salary Test** – Employees must be paid on a salary basis at not less than **$684 per week** (effective under current federal law).
2. **Duties Test** – Employees must perform specific job duties defined by the Department of Labor (DOL) regulations.

⚠️ **Important Note:**

- **Job titles alone do not determine exempt status.**
- Each position must be reviewed based on its **actual job duties and compensation structure**.
- An exemption only applies if **all requirements** under DOL regulations are met.

The Faulkner HR Solutions FLSA Exemption Checklist

Executive Exemption

To qualify, **all of the following must be true**:
☐ Employee is compensated on a salary basis at not less than **$684 per week**.
☐ Primary duty is managing the enterprise, or a recognized department/subdivision.
☐ Regularly directs the work of **two or more full-time employees or their equivalent**.
☐ Has authority to hire or fire, or recommendations are given particular weight.

Administrative Exemption

To qualify, **all of the following must be true**:
☐ Employee is compensated on a salary or fee basis at not less than **$684 per week**.
☐ Primary duty is office or non-manual work directly related to management or general business operations.
☐ Primary duty includes exercising discretion and independent judgment on matters of significance.

Professional Exemption

Learned Professional
☐ Employee is compensated on a salary or fee basis at not less than **$684 per week**.
☐ Primary duty is work requiring **advanced knowledge**, predominantly intellectual, involving discretion and judgment.
☐ Advanced knowledge is in a field of science or learning.
☐ Knowledge is customarily acquired through a **prolonged course of specialized intellectual instruction**.

Creative Professional
☐ Employee is compensated on a salary or fee basis at not less than **$684 per week**.
☐ Primary duty is work requiring **invention, imagination, originality, or talent** in a recognized artistic/creative field.

Computer Employee Exemption

☐ Employee is compensated on a salary basis of at least **$684 per week** or hourly at **$27.63 per hour**.
☐ Job title includes systems analyst, programmer, software engineer, or similarly skilled computer worker.
☐ Primary duty includes one or more of the following:
- ☐ Applying systems analysis techniques/procedures.
- ☐ Designing, developing, documenting, testing, or modifying software or systems.
- ☐ Creating or modifying machine-operating programs.
- ☐ Combination of the above requiring equivalent skills.

Outside Sales Exemption

☐ Primary duty is making sales or obtaining contracts.
☐ Employee is customarily and regularly engaged away from the employer's place of business.
(No salary minimum required for this exemption.)

Highly Compensated Employees

☐ Employee performs office or non-manual work.
☐ Total annual compensation is **$107,432 or more** (includes at least $684/week on a salary or fee basis).
☐ Employee regularly performs at least **one duty of an exempt executive, administrative, or professional employee**.

Blue-Collar Workers

☐ Not exempt. The Part 541 exemptions apply only to white-collar roles.
☐ Manual laborers, production workers, maintenance staff, and similar roles are entitled to minimum wage and overtime, regardless of pay level.

First Responders (Police, Fire, EMS)

☐ Not exempt. Police officers, detectives, firefighters, paramedics, EMTs, correctional officers, and similar employees are entitled to FLSA protections, regardless of rank or pay level.

Other Laws & Collective Bargaining Agreements

☐ Not exempt. Police officers, detectives, firefighters, paramedics, EMTs, correctional officers, and similar employees are entitled to FLSA protections, regardless of rank or pay level.

⚠️ **Reminder: Job titles alone do not determine exemption status. Each employee's actual duties and pay structure must be reviewed against FLSA requirements.**

7 Legal Pitfalls in Job Interviews That Could Cost You Thousands

Did you know that one wrong question during an interview could lead to costly discrimination claims? Our Interview Question Compliance Framework™ provides the guardrails you need.

Swipe to discover how to keep your hiring process both effective and legally compliant →

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Step 1: Apply the "Job-Relevance Test"

The cornerstone of compliant interviewing is ensuring every question directly connects to job performance. This simple test prevents most discrimination claims before they start.

1

Ask This

"This position requires frequent lifting up to 50 lbs. Can you perform that with or without accommodation?"

2

Not This

"Do you have any medical conditions that would prevent you from lifting heavy objects?"

The first question focuses on **essential job functions**, while the second improperly probes into medical history, potentially violating the ADA.

Step 2: Use the "Protected Category Filter"

Before any question leaves your lips, run it through this critical filter. If it touches on any protected class, you're entering dangerous territory.

Protected Categories

- Age (40+)
- Disability status
- National origin/citizenship
- Marital/family status

Also Protected

- Pregnancy
- Religion
- Gender/sexual orientation
- Race/ethnicity

Remember: If your question could reveal a protected characteristic, it likely creates legal exposure.

Step 3: Reframe with the "How, What, Can" Model

This powerful technique transforms potentially discriminatory questions into job-focused inquiries that get the information you actually need.

Instead of asking about family obligations...

~~"Do you have kids or plan to have children soon?"~~

Ask: "This role involves occasional weekend work and travel. Can you meet these schedule requirements?"

Instead of probing national origin...

~~"Where are you from originally? Is that accent Russian?"~~

Ask: "Are you legally authorized to work in the United States on an ongoing basis?"

By focusing on job capabilities rather than personal characteristics, you gather relevant information while maintaining compliance.

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Step 4: Standardize Across Candidates

Inconsistent interview questions are a red flag for discrimination claims. Create a structured approach that treats every candidate equally.

01

Create a structured interview guide

Develop a consistent set of questions tied directly to job requirements and use it for all candidates.

02

Document objectively

Record candidate responses with factual statements, not subjective impressions like "seems too young" or "might retire soon."

03

Apply consistent evaluation criteria

Use the same rating system or scorecard for all candidates to demonstrate fair assessment practices.

Standardization not only improves legal compliance but also leads to better hiring decisions based on qualifications rather than bias.

Step 5: Document & Train Your Team

Even one untrained interviewer can create significant liability. Comprehensive training and documentation create a culture of compliance.

1

Develop compliance tools

Create a "Safe vs. Unsafe Questions" cheat sheet for interviewers to reference before and during interviews.

2

Train for self-correction

Teach interviewers to recognize when they've strayed into problematic territory and how to redirect themselves professionally.

3

Maintain interview records

Keep detailed notes of questions asked and responses for at least one year (three years in high-risk industries) as documentation of fair practices.

Pro tip: Conduct quarterly compliance reviews of interview practices to identify and address potential issues before they become legal problems.

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Spotting Hidden Legal Risks

The most dangerous questions often seem innocent but can reveal protected characteristics indirectly. These "stealth discriminators" are where most companies create legal exposure.

Innocent-Sounding But Risky

"When did you graduate high school?" (reveals age)

"That's a unique name — where's it from?" (reveals national origin)

Compliant Alternatives

"What experience do you have with the software required for this role?"

"Do you have experience working in multicultural environments?"

According to EEOC data, employers paid over $485 million to resolve discrimination claims last year. Most started with seemingly casual questions like these.

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Protect Your Organization Before Problems Arise

Implementing the Interview Question Compliance Framework™ can dramatically reduce your legal exposure while improving your hiring quality.

Our comprehensive approach gives HR professionals and hiring managers the practical tools they need to conduct effective, legally-sound interviews without unnecessary complexity.

Ready to safeguard your hiring process? Schedule a Compliance Interview Audit with Dr. Thomas W. Faulkner, SPHR, LSSBB, to identify and eliminate hidden risks in your current practices.

Tag an HR professional who needs this framework, and share this post to help others create fair, effective, and legally-compliant hiring processes!

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