# Day One Checklist Overview

The Day One Checklist can be a vital tool in a knowledge management toolkit. This checklist outlines key points of contact, roles, responsibilities, and projects that relate to a position in the organization. It should be completed by the departing employee, reviewed by management, and stored in a shared location so that the incoming employee has a solid starting point once on board.

The drafting of this document ensures that critical information is not lost when there is a gap between a departing employee and an incoming employee.

The Day One Checklist should be customized for each organization to ensure that crucial information about the position is captured.

# Day One Checklist

Congratulations and welcome to [insert organization]. To help you quickly come up to speed in your role, this document lays out regular duties, responsibilities, projects, deadlines, contacts, and other information you will need to learn in your first days and weeks on the job. The information here supplements onboarding activities planned by the National Institutes of Health, our organization, your manager, and your colleagues. We wish you the best of luck and much success in your new position.

## Important Points of Contact

Sponsor:

Manager:

Human Resources Support:

Computer/IT:

Accessibility Requests:

## Regular Duties, Responsibilities, Activities

The following is a list of duties, responsibilities, and activities that you will likely perform on a regular and non-recurring basis. You should review this list with your manager to ensure these activities are necessary and align with expectations for the position.

**Daily:**

* This is placeholder text

**Weekly**

* This is placeholder text

**Monthly**

* This is placeholder text

**Quarterly**

* This is placeholder text

**Annually**

* This is placeholder text

**Non-Recurring**

* This is placeholder text

## Current Projects & Initiatives

The following are active projects and initiatives in which you will have a role.

|  |  |  |
| --- | --- | --- |
| **Project/Initiative Details** | **Your Role** | **Point of Contact** |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

## Upcoming Deadlines

The following are upcoming deadlines for which you will be directly responsible for or have a contributing role.

|  |  |  |
| --- | --- | --- |
| **Deadline** | **Deliverables / Responsibilities** | **Point of Contact** |
| MM/YY/DD |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

## Meetings or Events

The following are upcoming meetings or events for which you will be directly responsible for or have a contributing role.

|  |  |  |  |
| --- | --- | --- | --- |
| **Deadline** | **Meeting or Event** | **Role** | **Point of Contact** |
| MM/YY/DD |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## Key Contacts, Clients, Stakeholders

The following are individuals who may be contacting you, or with whom you should make contact, within your first few days and weeks on the job.

|  |  |  |
| --- | --- | --- |
| **Contact Name** | **Contact Type** | **Contact Details**  (email, phone, status, actions to be take, etc.) |
| John Doe | Client | [jdoe@companyx.com](mailto:jdoe@companyx.com)  555-555-5555  Currently counseling on trade barrier issue |
|  |  |  |
|  |  |  |

## Team Members

The following is a roster of team members with whom you will collaborate on a daily basis.

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Role** | **Summary of Responsibilities** | **Manager** |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

## Key Files to Read Immediately

The following documents are critical to understanding your new role and responsibilities during your first few days and weeks. These documents are also listed in the Knowledge Inventory.

|  |  |
| --- | --- |
| **File Name** | **Location** |
|  |  |
|  |  |
|  |  |
|  |  |

## Outstanding Decisions or Actions to be Taken

[List any outstanding decisions and activities that will be transferred to your successor]

* Action / Decision

## Recommended Actions to Take within the First 30 Days

[List any actions or tasks that should completed immediately upon assuming this role (e.g., making a connection with a key contact, attending a working group meeting, etc.]