



# Onboarding checklist

This onboarding checklist will help ensure your new hires are set up for success in their new role, and will make sure you don't miss any critical steps. Be sure to begin the onboarding process at least one week before your new employee's start date.

## First engagement

- ☐ Obtain signed job acceptance
- ☐ Confirm start date
- ☐ Send new employee welcome email

## Prepare new hire paperwork

- ☐ Tax forms (i.e., W-4 or W-9)
- ☐ Employment contract
- ☐ Non-disclosure, non-compete or other legal documents
- ☐ Employee handbook
- ☐ Benefits literature
- ☐ Job description

## Procure devices and equipment

- ☐ Computer (including keyboard, mouse, etc.)
- ☐ Phone
- ☐ Access to shared devices (printer, copier, fax machine, etc.)
- ☐ Mobile phone, tablet, or other additional job-specific devices

## Set up accounts and create logins

- ☐ WiFi access
- ☐ Voicemail
- ☐ Email
- ☐ Time clock system
- ☐ Access to CRM, project management software, or other job-specific technology
- ☐ Put in request for security clearance (if applicable)
- ☐ Add employee to relevant email distribution lists

## Set up workspace

- ☐ Reserve an office, cubicle or workstation
- ☐ Ensure space has a desk, chair or other necessary office furniture
- ☐ Provide necessary office supplies
- ☐ Provide a branded welcome kit (if applicable)

## First day

- ☐ Greet new employee
- ☐ Provide card, badge or other security assets
- ☐ Perform building tour
- ☐ Introduce new hire to team
- ☐ Send new hire announcement email
- ☐ Schedule team lunch
- ☐ Provide training plan

## Orientation

- ☐ Complete all remaining new hire paperwork
- ☐ Discuss benefits and insurance plans
- ☐ Review employee handbook
- ☐ Review safety policies
- ☐ Review technology policies and support process
- ☐ Assign a peer mentor

## Schedule check-in plan

- ☐ Obtain onboarding feedback
- ☐ Schedule one-week check-in
- ☐ Schedule 30-day check-in
- ☐ Schedule 60-day check-in
- ☐ Schedule 90-day check-in