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Customizable New Employee Onboarding Checklist

Onboarding processes are rarely limited to the employee's start date. Typically, some items are completed prior to the first day, while others are done on the first day and the remainder completed a month or longer afterwards.

	Before first day onboarding processes:
	Verify applicant is transitioned to employee status in relevant systems.
	Complete background checks and related verifications.
	Provide a list of forms and documents you need from the employee prior to or on the first day.
	Provide employee with an HR contact and the name and contact information for the direct manager. Enter the employee in your human resources management system (HRMS).
	Present first day or first week schedule and provide clear instructions on where and when to report to work.
	Alert IT to order and configure needed computers or smartphones.
	Prep new employee's workspace, uniforms and equipment so everything needed is ready on Day 1.
	Make sure all access codes and permissions are in place before employee reports for work. Decide who will be on hand to greet the employee.
	Enter your requirements here.

	First day onboarding processes:
	Welcome the new employee and provide any needed key cards.
	Gather all required new hire data, such as legal name, date of birth, social security number, tax filing status, tax withholding (W-9), bank info for direct-deposit paychecks, proof of citizenship status, work visas and/or other information as required by law.
	Ensure all internal new-hire paperwork, such as a nondisclosure agreement, is in good order. Address anything that is missing.
	Help employee become familiar with the workspace and overall facility.
	Make introductions to direct supervisor, co-workers and others.

	Present employee with access information to employee benefits portal and company information. Provide contacts in case they have any difficulty accessing, using or understanding the information.
	Present employee with passwords and access information for all devices, software and apps, as well as uniforms, identification badges and additional needed codes or keys.
	Present parking information and parking or other passes as necessary.
	Present information on pay periods, timesheets, pay dates and any other information relevant to pay. Enroll the employee in your HCM or payroll system.
	Get employee to sign for any company assets provided and indicate condition of each.
	Answer employee's questions.
	Enter your requirements here.

First week onboarding processes:

	Schedule a meeting to learn how the employee is adapting. If there are logistical problems, help solve them.
	Go over workflows and processes they'll need to make sure they understand and are comfortable in completing them.
	Ask if there are any questions or issues with benefits and address those.
	Introduce the employee, in an informal setting such as lunch, to executives, key peers and possibly even someone who is willing to act as a mentor.
	Ask about personal interests and call out related company activities or employees with similar interests so they have an opportunity to join in.
	Enter your requirements here.

First month onboarding processes:

	Now that the employee has had time to experience workflows, processes and equipment, ask for feedback. Address any issues or questions, and look for clues on where training may be helpful. Listen to criticism, as outsiders may identify better ways to perform tasks.
	Check with supervisors and peers on job performance, and offer constructive feedback.
	Schedule regular check-ins, and make sure the employee knows where to turn if problems arise between check-ins.
	Assess the effectiveness and availability of the employee's mentor or sponsor and offer feedback to that person as well.
	Enter your requirements here.