

Name:
 Start Date:
 Reports to:

Job Title:
 Pay Rate:
 Status (FT, PT, Salary, Hourly):

New Hire Onboarding Checklist

	TASK	WHEN
✓	Prepare for New Hire	
	Confirm salary and offer with a manager. Document at the top of the form.	1–2 weeks prior
	Notify all relevant departments of the new hire's name and start date so that everything is ready prior to Day 1: <ul style="list-style-type: none"> • IT login IDs and passwords? • Hardware and software installed and set up? • Phone and extension? • Office keys, time card, security badge, or parking passes? • Workspace, desk, file cabinets? • Name tag, office sign, business cards? 	1 week prior
	Prepare a welcome packet that should include, at a minimum: <ul style="list-style-type: none"> • New hire paperwork—I-9, payroll forms, W-4, etc. • Company handbook • Organization chart • Company policies 	1 week prior
	First Week	
	Welcome and introductions	Day 1
	Provide and complete critical new hire paperwork	Day 1
	Complete orientation session	Day 1–2
	Provide the employee with a company ID, workstation, computer, etc. Issue keys, badges, business cards, and any other tools they need	Day 1–2
	Provide training sessions	Day 2–5
	First Month	
	Review employee benefits and health insurance. Review enrollment forms and have them completed and signed, including	Before the end of month

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	health care, 401(k), beneficiaries, and other programs offered.	
	Provide training on business processes, tools, and software, including HR practices, safety, work policies, and supervisory or leadership training.	As needed, such as 4 hours per week
	Check to see how they're getting along with supervisors and peers. Do they have the contacts needed? Who do they need to meet?	Weekly
	Review performance goals. Find out how they're doing with tools and resources. Is there anything they need to be more productive?	Weekly
	First 90 Days	
	Additional training needed? Scheduled?	As needed
	Performance discussion scheduled and conducted?	Month 3
	Employee invited to team building activities, outings with peers?	As available
	Employee identified as a contributor on at least one project?	As available
	New hire feedback shared with HR, supervisor, and others?	Monthly
	Beyond 90 Days	
	Informal two-way conversations with manager to review performance, ideas, training needs, and other issues.	Month 3–10
	Check-in with HR to identify any needs, concerns, issues, or ideas.	Monthly
	Plan 1st year anniversary celebration or acknowledgment.	Month 11
	Conduct annual performance review and feedback sessions.	Month 12
	Additional Tasks and Notes	

Optional: File this document in the employee personnel folder for reference