

ONBOARDING CHECKLIST

New Employee's Name

Company Name

Manager

Role

Start Date

A great onboarding process can be the difference between retaining an employee and having to start the process over again! Detail all of the steps of your onboarding process below, and follow along during your new employee's onboarding process to make it a great one!

***Note:** This checklist can vary company-to-company and role-to-role. This is meant as a starting point to make sure your new hire is set up for success! We've left blank spaces for you to add tasks specific to your company and team.

Task name	Date to be completed by	Done	Notes
Candidate accepts and returns signed offer letter			
Complete background check, drug testing, or other pre-employment screenings, if needed			
Create an employee profile in your internal systems			
Initiate new hire onboarding paperwork for day one or pre-boarding (onboarding completed before their first day)			
Request shipping address from candidate (applicable if they need a new-hire materials or work-from-home equipment)			

Task name	Date to be completed by	Done	Notes
Ask IT to create email address, enable internal employee account, and order computer or any other necessary devices			
Create job-specific accounts or software needed and set up access with their email			
Organize training and new hire orientation			
Get employee set up in payroll and benefits systems			
Get desk or office space identified and set up			
Ensure I-9 is complete during pre-boarding or on day one of employment			
Ask security to enable building or parking access			
Coordinate start time for the employee's first day			
Plan a tour of your location (department, floor, or building) and how you'll introduce everyone on your team to your new hire			
Set aside time on your calendar for their first day			

