New Hire Onboarding Checklist

Employee: [Name] | Position: [Job Title] | Manager: [Name] | Buddy: [Name] | Start date: [Date] | Location / remote: [Site]

Each item shows its owner in brackets: (HR), (Mgr) for the hiring manager, (IT), (Buddy) or (Emp) for the new employee. Tick items as they are done and note the date. Remove items that do not apply to this role.

WEEK BEFORE START: PRE-BOARDING

- [ ] (HR) Confirm all offer contingencies are cleared and pre-employment paperwork is complete or scheduled
- [ ] (HR) Send welcome email with start time, location or video link, parking, dress code, first-day contact and the list of acceptable I-9 documents
- [ ] (Mgr) Call or message the new hire to say you are looking forward to their start
- [ ] (IT) Set up email, systems and phone accounts; test logins
- [ ] (IT) Prepare or ship equipment; confirm delivery for remote hires
- [ ] (Mgr) Build the first-week schedule: orientation, training blocks, meetings, shadowing
- [ ] (Mgr) Assign a buddy and brief them on their role
- [ ] (Mgr) Tell the team who is starting, when and in what role

DAY 1

- [ ] (Mgr) Greet the new hire on arrival or on the first video call, on time
- [ ] (HR) Complete Form I-9 Section 1 and review documents for Section 2 (deadline: third business day)
- [ ] (HR) Collect any outstanding tax, direct deposit and emergency contact forms
- [ ] (IT) Hand over equipment and badge; confirm the new hire can log in to every system they need
- [ ] (Mgr) Walk through the role, team structure and what the first week will look like
- [ ] (Mgr) Tour the site: work area, break room, restrooms, exits, first aid, safety equipment
- [ ] (Buddy) Have lunch or a virtual coffee with the new hire
- [ ] (HR) Explain pay schedule, timekeeping and how to report hours (non-exempt employees)
- [ ] (Mgr) End-of-day check-in: what went well, what is unclear

WEEK 1

- [ ] (HR) Complete orientation: mission, history, policies, handbook acknowledgment
- [ ] (HR) Complete required training: harassment prevention, safety, data privacy, any state-mandated courses
- [ ] (HR) Explain benefits, enrollment deadline and how to enroll
- [ ] (Mgr) Set 3 to 5 written goals for the first 30 days
- [ ] (Mgr) Introduce the new hire to key contacts in other teams
- [ ] (Emp) Shadow experienced colleagues on core tasks
- [ ] (Mgr) Hold a 1:1 at the end of week 1 and adjust the plan

DAYS 8 TO 30

- [ ] (Mgr) Hold a weekly 1:1
- [ ] (Emp) Complete role-specific training and system certifications
- [ ] (Emp) Take on first independent work with review
- [ ] (Mgr) Give specific feedback on early work, both what is working and what to change
- [ ] (HR) Confirm benefits enrollment is complete
- [ ] (Mgr) 30-day review: progress against goals, set goals for days 31 to 60
- [ ] (HR) 30-day pulse survey or short check-in conversation with the new hire

DAYS 31 TO 60

- [ ] (Mgr) Increase independence and workload toward full productivity
- [ ] (Emp) Join regular team meetings and processes as a full participant
- [ ] (Mgr) Review any performance or quality metrics against target
- [ ] (Buddy) Final buddy check-in and handover
- [ ] (Mgr) 60-day review: progress, gaps, support needed, goals for days 61 to 90

DAYS 61 TO 90

- [ ] (Emp) Work at or near full expected performance
- [ ] (Mgr) 90-day review: performance against goals, strengths, development plan
- [ ] (Mgr) Complete introductory or probation review, if your organization uses one
- [ ] (HR) 90-day onboarding feedback survey
- [ ] (Mgr) Set goals for the next 6 months and schedule the regular review cycle

SIGN-OFF

Onboarding complete (manager) Date

Date

Employee acknowledgment Date

Date

What should we change in onboarding for the next hire?