New Hire Training Checklist

Use one checklist per new hire. For each item, the trainer initials and dates the Trained column when the topic is taught, and the Competent column only when the new hire has done the task correctly without help. Replace bracketed items with your role's systems and tasks. Keep the completed checklist in the employee's training record.

EMPLOYEE AND TRAINER DETAILS

New hire name

Job title

Department / site

Start date

Manager

Primary trainer or buddy

Training format

☐ One-to-one on the job ☐ New-hire class ☐ Blended (class plus on the job) ☐ Remote

Target date to work independently

BEFORE DAY ONE (MANAGER AND TRAINER)

- ☐ Training schedule for the first two weeks written and shared with the trainer
- ☐ Trainer or buddy assigned and their own workload reduced for the training period
- ☐ System accounts requested: [system 1], [system 2], email, timekeeping
- ☐ Required equipment, PPE or uniform ready
- ☐ Training materials, job aids and procedure documents printed or shared
- ☐ Practice or test environment access set up where available

WEEK 1: FOUNDATIONS

- ☐ Role overview: what good looks like, how performance is measured, key metrics and targets
- ☐ Walkthrough of a full day or shift in the role
- ☐ Safety training required for the role completed and recorded
- ☐ Logging in, timekeeping, breaks and how to report absence
- ☐ Core system navigation: [system 1]
- ☐ Core system navigation: [system 2]

- [ ] Top 5 most common tasks demonstrated by the trainer
- [ ] New hire shadows an experienced employee for at least [number] hours
- [ ] Where to find procedures, job aids and who to ask for help
- [ ] Required compliance training for the role started (e.g. privacy, harassment prevention, data security)
- [ ] End-of-week check-in with manager: questions, concerns, pace

WEEKS 2 TO 4: DOING THE WORK WITH SUPPORT

- [ ] New hire performs the top 5 tasks with the trainer watching (side-by-side)
- [ ] Quality standard explained, with real examples of passing and failing work
- [ ] Handling the most common exceptions: [exception 1], [exception 2], [exception 3]
- [ ] Escalation process: when and how to escalate, and to whom
- [ ] Customer, patient or client interaction standards (if applicable)
- [ ] First quality review or audit of the new hire's work, with feedback
- [ ] Productivity expectation for weeks 2 to 4 explained (ramp target, not full target)
- [ ] Compliance training for the role completed
- [ ] Week 4 check-in with manager: progress against ramp targets

DAYS 30 TO 90: INDEPENDENCE

- [ ] New hire works independently on routine tasks with spot checks
- [ ] Less common tasks taught: [task], [task], [task]
- [ ] Second and third quality reviews completed, scores recorded
- [ ] Cross-training on one adjacent task for coverage (if planned)
- [ ] Ramp target met for two consecutive weeks
- [ ] Competency sign-off for every task on this checklist
- [ ] Day 90 review with manager: performance, development goals, feedback on the training

COMPETENCY SIGN-OFF (REPEAT PER TASK)

Task

Date trained

Trainer initials (trained)

Date competent

How verified

- [ ] Observed doing it correctly 3 times
- [ ] QA or audit score at standard
- [ ] Test or assessment passed
- [ ] Certification issued

Trainer initials (competent)

FINAL SIGN-OFF

☐ All tasks signed off as competent

Open items and plan to close them

New hire signature

Date

Trainer signature

Date

Manager signature

Date

Date