Remote Onboarding Checklist

New hire: [Name] | Role: [Job Title] | Manager: [Name] | Buddy: [Name] | Time zone: [Zone] | Start date: [Date] | Shipping address: [Address]

Owner in brackets: (HR), (Mgr) manager, (IT), (Buddy), (Emp) new employee. Items marked [WAH] apply to work-at-home contact center agents.

10 TO 14 DAYS BEFORE START

- [ ] (HR) Send pre-boarding packet electronically: tax forms, direct deposit, emergency contacts, policy acknowledgments
- [ ] (HR) Confirm I-9 method: DHS alternative procedure by live video (E-Verify employers only) or an authorized representative who examines documents in person
- [ ] (IT) Order laptop, headset, monitor and any peripherals; ship with tracking and signature on delivery
- [ ] (IT) Ship a return label and instructions for the old-equipment process, so the new hire knows it exists
- [ ] (HR) Confirm home internet requirements in writing (for example minimum download and upload speeds, wired connection)
- [ ] (HR) [WAH] Send the home workspace requirements: quiet, private room, door that closes, no background noise during calls
- [ ] (Mgr) Send a personal welcome message and confirm first-day start time in the new hire's time zone

3 TO 5 DAYS BEFORE START

- [ ] (IT) Confirm equipment delivered; schedule a 30-minute setup call before day one
- [ ] (IT) New hire powers on, connects to Wi-Fi or ethernet, completes MFA setup and logs in to email and chat
- [ ] (IT) [WAH] Run a network test: speed, latency, and a test call through the phone system
- [ ] (Mgr) Send the first-week calendar with video links already attached to every meeting
- [ ] (Buddy) Send a short hello message and book a 20-minute video coffee for day one
- [ ] (HR) Reimbursement policy for home office costs shared, where required or offered

DAY 1

- [ ] (Mgr) Open the first video call yourself at start time; cameras on for the welcome
- [ ] (HR) Complete I-9 Section 2 by live video or confirm the authorized representative appointment (deadline: third business day)
- [ ] (IT) Join the first hour to fix any access problems on the spot
- [ ] (Mgr) Walk through the role, the 30-day goals and how the team communicates (which channel, response times, core hours)
- [ ] (Mgr) Share the team directory with photos and what each person works on
- [ ] (Buddy) Video coffee; explain the unwritten rules of working remotely here
- [ ] (Emp) Complete one short task or training module before the end of the day

- [ ] (Mgr) End-of-day video check-in: what is working, what is not

WEEK 1

- [ ] (Mgr) Daily 15-minute check-in on video
- [ ] (HR) Virtual orientation: company, benefits, policies, safety and data security at home
- [ ] (Emp) Complete required compliance training in the learning platform
- [ ] (Mgr) Arrange 3 to 5 one-to-one video introductions with key colleagues
- [ ] (Emp) Shadow a colleague's live work by screen share for at least two sessions
- [ ] (Mgr) [WAH] Confirm schedule adherence tools and how breaks are logged
- [ ] (Mgr) End-of-week 1:1: progress, questions, adjustments

WEEKS 2 TO 4

- [ ] (Mgr) Move to twice-weekly check-ins, then weekly 1:1s
- [ ] (Emp) Take on first independent work with review
- [ ] (Buddy) Check in at least twice a week
- [ ] (Mgr) Invite the new hire to one informal team call (coffee chat, game, show and tell)
- [ ] (HR) 30-day pulse survey on the remote onboarding experience

DAYS 30 TO 90

- [ ] (Mgr) 30, 60 and 90-day reviews on video with written notes
- [ ] (Mgr) Plan an in-person meeting or team visit if your budget allows
- [ ] (Mgr) Confirm the new hire knows who to ask outside their team
- [ ] (HR) 90-day onboarding survey and retention check

SIGN-OFF

Equipment received and working

I-9 completion method

- [ ] Alternative procedure (live video)
- [ ] Authorized representative
- [ ] In person

I-9 Section 2 completed

Home setup check passed

- [ ] Yes
- [ ] No
- [ ] Not applicable

Open issues

Manager signature

Date

Date