New Employee Onboarding Checklist

Before First Day

HR Department

☐ Complete employment paperwork (offer letter, contract)
☐ Collect personal information (tax forms, emergency contacts)
☐ Set up employee in HRIS system
☐ Prepare benefits enrollment materials
☐ Create employee ID
☐ Assign workspace/office location
☐ Order business cards (if applicable)

IT Department

☐ Set up email account
☐ Prepare computer/hardware
☐ Create accounts for necessary software
☐ Set up phone extension
☐ Prepare access badge

Department Manager

☐ Prepare first-week schedule
☐ Assign onboarding buddy
☐ Inform team of new hire
☐ Set up initial meetings with key stakeholders
☐ Prepare training materials

First Day

HR Department

☐ Welcome and introduction
☐ Office tour
☐ Review company policies
☐ Explain benefits and enrollment process
☐ Complete remaining paperwork
☐ Provide employee handbook

IT Department

☐ Distribute computer/hardware
☐ Provide access badge
☐ Basic systems training
☐ Set up multi-factor authentication
☐ Review IT policies and security procedures

Department Manager

- ☐ Welcome meeting
- ☐ Introduce to team members
- ☐ Explain role and responsibilities
- ☐ Set initial goals and expectations
- ☐ Introduce to onboarding buddy

First Week

HR Department

- ☐ Benefits enrollment session
- ☐ Company culture overview
- ☐ Health and safety training
- ☐ Review time tracking procedures

IT Department

- ☐ Advanced systems training
- ☐ Department-specific software training
- ☐ Data security training

Department Manager

- ☐ Role-specific training
- ☐ Regular check-ins
- ☐ Assign initial projects
- ☐ Introduce to cross-functional partners
- ☐ Review 30/60/90 day plan

First Month

HR Department

- ☐ Follow-up on benefits enrollment
- ☐ Complete mandatory compliance training
- ☐ Review probation period expectations

Department Manager

- ☐ First performance check-in
- ☐ Gather feedback on onboarding process
- ☐ Adjust goals if necessary
- ☐ Ensure all required training is completed

Department-Specific Onboarding

Engineering

- ☐ Code repository access
- ☐ Development environment setup

- ☐ Architecture overview
- ☐ Code review process training
- ☐ DevOps procedures
- ☐ On-call rotation explanation (if applicable)

Marketing

- ☐ Brand guidelines review
- ☐ Marketing calendar access
- ☐ Campaign management tool training
- ☐ Social media policy review
- ☐ Content approval process

Sales

- ☐ CRM system training
- ☐ Sales methodology training
- ☐ Product training
- ☐ Territory/account assignments
- ☐ Compensation plan review
- ☐ Expense reporting procedures

Finance

- ☐ Financial systems access
- ☐ Accounting procedures
- ☐ Budget process overview
- ☐ Expense approval process
- ☐ Financial reporting requirements

HR

- ☐ HRIS advanced training
- ☐ Recruiting tools access
- ☐ Employee relations procedures
- ☐ Compliance requirements
- ☐ Benefits administration

This checklist should be customized based on the employee's role, department, and specific needs. The hiring manager and HR representative should collaborate to ensure all relevant items are included.