

EMPLOYEE ONBOARDING CHECKLIST

Employee Information

Field	Details
Employee Name	
Position / Title	
Start Date	
Department	
Manager	
Buddy / Mentor	

Phase 1: Pre-Boarding (Before Day 1)

To be completed by HR and the Hiring Manager.

Administration & Paperwork

- ☐ Signed offer letter and contract received.
- ☐ Background check completed (if applicable).
- ☐ Employee added to HR/Payroll system.
- ☐ Benefits package information prepared.

IT & Equipment

- ☐ Company email address created.
- ☐ Laptop/Computer configured and ordered.
- ☐ Access grants created (Slack, Microsoft Teams, Jira, CRM, etc.).
- ☐ Keycard / Building access fob prepared.

Team Preparation

- ☐ "Welcome to the Team" email sent to the department.
- ☐ Onboarding Buddy assigned.
- ☐ First week schedule / calendar invites blocked out.

Phase 2: Day 1 (The Welcome)

Focus: Logistics and settling in.

The Basics

- ☐ Welcome kit / Swag bag provided.
- ☐ Office tour (Restrooms, emergency exits, kitchen, printer) OR Virtual Tour.
- ☐ Workstation setup (Monitor, keyboard, ergonomic check).
- ☐ IT setup verification (Login to email and Slack/Teams).

Introductions

- ☐ Introduction to the immediate team.
- ☐ 30-minute welcome meeting with the Manager.
- ☐ Introduction to the Onboarding Buddy.

HR Session

- ☐ Review of Employee Handbook.
- ☐ Tax forms and direct deposit setup completed.
- ☐ Review of holidays and leave policy.

Phase 3: Week 1 (Orientation & Training)

Focus: Understanding the company and the role.

Role Specifics

- ☐ Review job description, expectations, and KPIs.
- ☐ Overview of current projects and team goals.
- ☐ Training on department-specific tools/software.
- ☐ Shadowing a team member on a core task.

Company Culture

- ☐ Meeting with Department Head / Leadership (if applicable).
- ☐ Review company Mission, Vision, and Values.
- ☐ Join relevant social channels or employee resource groups.

Check-in

- ☐ End-of-week 1:1 check-in with Manager (Feedback & Q&A).

Phase 4: First 30 Days (Ramping Up)

Focus: Independence and contribution.

- ☐ Completion of all compliance and security training.
- ☐ First small project or assignment completed.
- ☐ 1:1 meetings scheduled with key cross-functional stakeholders.
- ☐ Set 30/60/90 day performance goals.
- ☐ 30-Day performance review.

Phase 5: First 90 Days (Integration)

Focus: Long-term success.

- ☐ Full autonomy on core responsibilities.
 - ☐ Completion of probationary period (if applicable).
 - ☐ Identify long-term professional development goals.
 - ☐ 90-Day Performance Review and Feedback session.
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Signatures

By signing below, the employee and manager acknowledge that the onboarding process has been substantially completed.

Employee Signature: _____ **Date:** _____

Manager Signature: _____ **Date:** _____