

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.
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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:** _____