

Checklist

Employee Onboarding Process Checklist

Employee:

First working day:

Manager:

1. Preboarding

- ☐ Send welcome details and first-week schedule
- ☐ Complete required HR, payroll, and policy forms
- ☐ Prepare workspace, equipment, badge, and required tools
- ☐ Create email, accounts, software access, and MFA
- ☐ Assign a buddy and prepare a 30-60-90-day plan

2. Day One

- ☐ Welcome and introduce manager, team, and buddy
- ☐ Review role, priorities, and communication norms
- ☐ Complete key policy, safety, and security training
- ☐ Hand over and document devices or other assigned assets
- ☐ Test email, core tools, and required access

3. First Month

- ☐ Complete role training and key introductions
- ☐ Hold weekly manager check-ins and assign first tasks
- ☐ Resolve missing access, equipment, or training needs
- ☐ Review 30-day goals and collect feedback

4. Days 60-90

- ☐ Review performance, independence, and development needs
- ☐ Confirm assets, access, and training records are current
- ☐ Hold a formal 90-day check-in and agree on next goals

New-Hire Feedback: What was missing or could be improved?
