**New Hire Onboarding Checklist**

|  |  |  |
| --- | --- | --- |
|  | **TASK** | **WHEN** |
| ✔ | **Prepare for New Hire** |  |
|  | Confirm salary and offer with a manager. Document at the top of the form. | 1–2 weeks prior |
|  | Notify all relevant departments of the new hire's name and start date so that everything is ready prior to Day 1:   * IT login IDs and passwords? * Hardware and software installed and set up? * Phone and extension? * Office keys, time card, security badge, or parking passes? * Workspace, desk, file cabinets? * Name tag, office sign, business cards? | 1 week prior |
|  | Prepare a welcome packet that should include, at a minimum:   * New hire paperwork—I-9, payroll forms, W-4, etc. * Company handbook * Organization chart * Company policies | 1 week prior |
|  | **First Week** |  |
|  | Welcome and introductions | Day 1 |
|  | Provide and complete critical new hire paperwork | Day 1 |
|  | Complete orientation session | Day 1–2 |
|  | Provide the employee with a company ID, workstation, computer, etc. Issue keys, badges, business cards, and any other tools they need | Day 1–2 |
|  | Provide training sessions | Day 2–5 |
|  | **First Month** |  |
|  | Review employee benefits and health insurance. Review enrollment forms and have them completed and signed, including | Before the end of month |

|  |  |  |
| --- | --- | --- |
|  | health care, 401(k), beneficiaries, and other programs offered. |  |
|  | Provide training on business processes, tools, and software, including HR practices, safety, work policies, and supervisory or leadership training. | As needed, such as 4 hours per week |
|  | Check to see how they’re getting along with supervisors and peers. Do they have the contacts needed? Who do they need to meet? | Weekly |
|  | Review performance goals. Find out how they’re doing with tools and resources. Is there anything they need to be more productive? | Weekly |
|  | **First 90 Days** |  |
|  | Additional training needed? Scheduled? | As needed |
|  | Performance discussion scheduled and conducted? | Month 3 |
|  | Employee invited to team building activities, outings with peers? | As available |
|  | Employee identified as a contributor on at least one project? | As available |
|  | New hire feedback shared with HR, supervisor, and others? | Monthly |
|  | **Beyond 90 Days** |  |
|  | Informal two-way conversations with manager to review performance, ideas, training needs, and other issues. | Month 3–10 |
|  | Check-in with HR to identify any needs, concerns, issues, or ideas. | Monthly |
|  | Plan 1st year anniversary celebration or acknowledgment. | Month 11 |
|  | Conduct annual performance review and feedback sessions. | Month 12 |
|  | **Additional Tasks and Notes** |  |
|  |  |  |
|  |  |  |

***Optional:*** *File this document in the employee personnel folder for reference*