

EMPLOYEE ONBOARDING CHECKLIST

EMPLOYEE INFORMATION

Employee Name: _____ Title/Department: _____
Phone Number: _____ Email Address: _____
First Day of Work: _____

PRE-BOARDING

Employee Details:

- ☐ - Signed job acceptance
- ☐ - Confirm start date
- ☐ - Send welcome email

Paperwork:

- ☐ - Tax forms (W-4 or W-9)
- ☐ - Legal documents (I-9, NDA, etc)
- ☐ - Employment contract

Devices and Equipment:

- ☐ - Computer, phone
- ☐ - Set up workspace
- ☐ - Job specific devices

Logins and Accounts

- ☐ - Email
- ☐ - Relevant company accounts
- ☐ - Add employee to email lists

Notes:

FIRST DAY ORIENTATION

- | | |
|---|--|
| <input type="checkbox"/> - Provide credentials | <input type="checkbox"/> - Review company policies |
| <input type="checkbox"/> - Give office/building tour | <input type="checkbox"/> - Discuss benefits/insurance |
| <input type="checkbox"/> - Introduce employee to team | <input type="checkbox"/> - Provide account information |
| <input type="checkbox"/> - Select and introduce peer mentor | <input type="checkbox"/> - Schedule relevant meetings |
| <input type="checkbox"/> - Discuss role/responsibilities | <input type="checkbox"/> - Ask for onboarding feedback |
| <input type="checkbox"/> - Discuss training plan | <input type="checkbox"/> - Schedule check-in plan |
| <input type="checkbox"/> - Complete new hire paperwork | |

Notes:

SIGNATURE

By signing this form, you confirm that this onboarding checklist has been completed and that the appropriate steps have been taken to bring the new employee on board.

Signature: _____ Date: _____

Name/Title: _____