



# New Employee Onboarding Checklist

Free New Employee Onboarding Checklist with AI customization. Industry-specific guidance for new employee onboarding checklist. Build your checklist now.

## Pre-Boarding Phase (After Offer Acceptance)

- ☐ Send signed offer letter to HR
- ☐ Initiate background screening process
- ☐ Send new hire paperwork electronically
- ☐ Share employee handbook digitally
- ☐ Send IT equipment order form
- ☐ Create employee profile in HRIS
- ☐ Schedule first-day agenda
- ☐ Send welcome package to home address
- ☐ Share parking/commute information
- ☐ Provide dress code guidelines
- ☐ Send org chart and team bios
- ☐ Schedule pre-start virtual meet and greet

## Day 1: Welcome & Orientation

- ☐ Reception greeting and welcome
- ☐ Provide agenda for the day
- ☐ Complete I-9 documentation
- ☐ Take employee photo for ID/directory
- ☐ Issue security credentials
- ☐ Tour office facilities
- ☐ Set up workspace
- ☐ Introduce to immediate team
- ☐ Lunch with manager or team
- ☐ Review emergency procedures
- ☐ Complete initial paperwork
- ☐ Provide company swag

## Administrative Setup

- ☐ Process payroll information
- ☐ Set up benefits enrollment
- ☐ Configure time tracking system
- ☐ Issue corporate credit card (if applicable)
- ☐ Set up expense account
- ☐ Provide employee ID number
- ☐ Register for parking/transit benefits
- ☐ Add to insurance policies

- ☐ Update organizational records
- ☐ File personnel documents
- ☐ Create employee file
- ☐ Set up performance management profile

## Systems & Tools Access

- ☐ Create Active Directory account
- ☐ Set up computer and peripherals
- ☐ Configure email and signatures
- ☐ Install required software
- ☐ Provide collaboration tool access
- ☐ Set up calendar permissions
- ☐ Configure mobile device
- ☐ Provide shared drive access
- ☐ Set up project management tools
- ☐ Grant database permissions
- ☐ Configure reporting tools
- ☐ Establish backup procedures

## Training & Development Plan

- ☐ Enroll in orientation program
- ☐ Schedule department overview
- ☐ Assign training modules
- ☐ Set up mentor meetings
- ☐ Plan job shadowing sessions
- ☐ Schedule product/service training
- ☐ Register for skills workshops
- ☐ Create learning timeline
- ☐ Provide training resources
- ☐ Set certification targets
- ☐ Plan cross-functional meetings
- ☐ Establish development goals

## Integration & Socialization

- ☐ Team introduction meeting
- ☐ Department welcome lunch
- ☐ Coffee with colleagues
- ☐ Add to team chat channels
- ☐ Include in social committees
- ☐ Share team traditions
- ☐ Explain informal norms
- ☐ Introduce to other departments
- ☐ Add to company directory with bio
- ☐ Include in team events
- ☐ Share internal resources

- ☐ Connect with employee networks

## Performance & Expectations

- ☐ Review detailed job description
- ☐ Set SMART goals for first 90 days
- ☐ Explain performance review process
- ☐ Clarify success metrics
- ☐ Discuss career path options
- ☐ Schedule regular 1-on-1s
- ☐ Provide feedback mechanisms
- ☐ Explain promotion criteria
- ☐ Review compensation structure
- ☐ Discuss professional development
- ☐ Set expectations timeline
- ☐ Create development plan

## Follow-Up Schedule

- ☐ End of Day 1 check-in
- ☐ End of Week 1 review
- ☐ Two-week evaluation
- ☐ 30-day formal review
- ☐ 60-day progress check
- ☐ 90-day performance review
- ☐ 6-month evaluation
- ☐ Annual review scheduling
- ☐ Ongoing feedback sessions
- ☐ Career planning discussions
- ☐ Training completion tracking
- ☐ Satisfaction surveys

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