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Staff Onboarding Checklist

Free Staff Onboarding Checklist with AI customization. Industry-specific guidance for staff onboarding checklist. Build your checklist now.

Pre-Arrival Coordination

- ☐ Confirm start date with new staff
- ☐ Send welcome package
- ☐ Mail/email necessary forms
- ☐ Coordinate with IT for equipment
- ☐ Arrange workspace setup
- ☐ Order business cards
- ☐ Schedule orientation sessions
- ☐ Assign buddy/mentor
- ☐ Inform team of arrival
- ☐ Prepare first-day agenda
- ☐ Set up building access
- ☐ Plan welcome activities

First Day Essentials

- ☐ Welcome and introduction
- ☐ Provide facility tour
- ☐ Issue ID badge and keys
- ☐ Complete employment forms
- ☐ Set up workstation
- ☐ Provide equipment
- ☐ Introduce to team
- ☐ Review emergency procedures
- ☐ Explain office logistics
- ☐ Provide supplies
- ☐ Give orientation materials
- ☐ Schedule lunch with team

Documentation Processing

- ☐ Verify identification documents
- ☐ Complete tax forms
- ☐ Process benefits enrollment
- ☐ Set up payroll
- ☐ Sign employment contract
- ☐ Complete confidentiality agreements
- ☐ Emergency contact information
- ☐ Medical information/allergies

- ☐ Professional licenses/certifications
- ☐ Background check completion
- ☐ Reference verification
- ☐ Policy acknowledgments

Systems & Access

- ☐ Create email account
- ☐ Set up computer login
- ☐ Configure phone/voicemail
- ☐ Grant software access
- ☐ Set up printer access
- ☐ Configure VPN if needed
- ☐ Provide intranet access
- ☐ Add to team calendars
- ☐ Set up time tracking
- ☐ Grant database access
- ☐ Configure security permissions
- ☐ Provide training on systems

Role Training

- ☐ Review position description
- ☐ Explain responsibilities
- ☐ Set performance expectations
- ☐ Introduce work processes
- ☐ Provide procedure manuals
- ☐ Schedule skill training
- ☐ Arrange job shadowing
- ☐ Assign initial projects
- ☐ Set learning objectives
- ☐ Create training timeline
- ☐ Schedule progress reviews
- ☐ Provide resources

Cultural Integration

- ☐ Share organization mission/vision
- ☐ Explain values and culture
- ☐ Review organizational structure
- ☐ Introduce leadership team
- ☐ Explain communication norms
- ☐ Share company history
- ☐ Review policies and procedures
- ☐ Discuss professional development
- ☐ Introduce social committees
- ☐ Share success stories
- ☐ Explain recognition programs

- ☐ Connect with networks

Department Orientation

- ☐ Department overview presentation
- ☐ Team member introductions
- ☐ Explain team dynamics
- ☐ Review department goals
- ☐ Share current projects
- ☐ Explain workflows
- ☐ Introduce key contacts
- ☐ Review meeting schedules
- ☐ Share department resources
- ☐ Explain reporting structure
- ☐ Discuss priorities
- ☐ Set initial assignments

Professional Development

- ☐ Discuss career path
- ☐ Identify development needs
- ☐ Create learning plan
- ☐ Schedule training sessions
- ☐ Provide learning resources
- ☐ Set up mentorship
- ☐ Discuss performance reviews
- ☐ Explain promotion process
- ☐ Share growth opportunities
- ☐ Connect with professional groups
- ☐ Plan skill assessments
- ☐ Set development goals

30-Day Check-In

- ☐ Schedule review meeting
- ☐ Assess progress
- ☐ Address concerns
- ☐ Review performance
- ☐ Adjust training plan
- ☐ Gather feedback
- ☐ Confirm role understanding
- ☐ Check system access
- ☐ Verify documentation complete
- ☐ Review goals
- ☐ Plan next phase
- ☐ Document progress

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