



Onboarding Checklist

Pre-Onboarding (1-2 Weeks Before Start Date)

Tasks:

- Send a welcome email with:
 - Start date, time, and location (or virtual login details).
 - Employee Handbook
 - Benefit Plans
 - Contact information for questions.
 - Prepare and send employment forms:
 - Offer letter (if not signed yet).
 - Tax forms (W-4, state-specific forms).
 - Direct deposit authorization.
 - I-9 Employment Eligibility form and instructions.
 - Set up IT accounts and access:
 - Email address.
 - HRIS system login.
 - Tools/software (Slack, Teams, project management systems).
 - Coordinate workspace
 - Desk, chair, and supplies (if on-site).
 - Laptop/PC and peripherals (onsite or remote).
 - Assign a mentor or onboarding buddy.
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Day 1: Welcome and Orientation

Morning:

- Meet with IT Team
 - Logins, email setup, help desk processes
- Meet with manager:
 - Overview of initial projects/tasks.
 - Assign 30-60-90 Day Plan.

Midday:

- Meet with HR to review key policies:
 - Employee handbook.
 - Code of conduct.
 - Safety and emergency procedures.

Afternoon:

- Meet with team members
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Week 1: Getting Started

Day 2-3:

- Department-specific training.
- Introduction to key stakeholders.
- Walkthrough of day-to-day tools and processes.
- Complete mandatory compliance training:
 - Anti-harassment training (state-specific requirements).
 - OSHA or safety training.

Day 4-5:

- Shadow a team member or mentor.
 - Begin assigned tasks with guidance.
 - Attend team meetings to observe culture and workflows.
 - Check-in with manager for feedback/questions.
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Week 2-4: Deepening Engagement

- Continue role-specific training.
 - Review company mission, vision, and goals in depth.
 - Complete additional training (as required):
 - Technical skills development.
 - Leadership or DEI programs.
 - Start contributing to independent projects/tasks.
 - Schedule a 1-on-1 with HR to discuss benefits enrollment and resources.
 - Hold a team social or virtual coffee chat to build connections.
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Month 1: Evaluating Progress

- Manager check-in:
 - Review 30-day progress.
 - Set short-term goals for next 30 days.
 - Solicit feedback from new hire about onboarding experience.
 - Celebrate milestones: Completion of first task/project.
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Month 2-3: Integration and Development

- Conduct 60-day and 90-day reviews.
- Discuss long-term goals and development opportunities.
- Encourage participation in company-wide initiatives (committees, volunteer programs).
- Finalize onboarding program with a feedback session.