

New Hire Onboarding **CHECKLIST**

Use this new hire onboarding checklist to keep track of every task during the onboarding process. We've included all essential steps in a phased outline.

Phase 1: Offer Stage

- Collect new employee's signed offer letter.
- Send welcome email and new hire forms.

Phase 2: Before Official Start Date

- Prepare your employee's workstation.
 - If remote and/or hybrid, prepare any equipment your employee will need when not in-office.
- IT to set up access to required platforms and databases.
- Obtain required keys or access badges.
- Create your new hire's schedules for the first day and week.
- If your new hire is client-facing, notify any affected clients of changes.

Phase 3: First Day

- Send email to the company/departments introducing new hires.
- Provide your new hire with their onboarding schedule.
- Provide additional onboarding paperwork.

Phase 4: First Week

- Request onboarding feedback.
- Ensure all technology is working properly including access to systems.
- Set up weekly check-in meetings with direct manager.
- Optional: designate a mentor for your new hire to shadow and train with.

Phase 5: One Month

- Check-in on work progress and initial goals and provide additional support if needed.
- Ensure benefits enrollment is completed.

Phase 6: 60 and 90 Days

- Check-in on long-term goal progress.
- Gather feedback and address any concerns.

Phase 7: Six- Nine Months

- Complete a formal review.

Phase 8: One Year

- Complete a formal one-year review.
- Set and establish new short- and long-term goals.



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