

HR Onboarding Template

HR's checklist for paperwork, compliance and the first 90 days

This template covers HR's side of onboarding, from the signed offer to the probation review. Use it alongside the hiring manager's plan so nothing falls between HR and the hiring team.

Delete the tasks that don't apply to your company and add your own. Timing is shown relative to the start date, so "-7" means one week before day one. Rules for right-to-work checks, tax forms and record keeping vary by country, so check local requirements before you use it.

Tip: Every grey box in this PDF is fillable. Click a box to type, and tick the checkboxes as tasks are done. Save a copy for each new hire so you keep a record of their onboarding.

Employee details

Employee name

Employee ID

Job title

Department

Hiring manager

HR owner

Employment type (full-time / part-time / contract)

Start date

Work location

Probation end date

Offer and contract

Lock in the core details before anything else moves.

Done	Task	Owner	When	Due date
☐	Send the offer letter and track acceptance	HR	21 days before	
☐	Issue the employment contract for signature	HR	18 days before	
☐	Run background or reference checks, if you use them	HR	18 days before	
☐	Create the employee record in your HRIS	HR	14 days before	
☐	Confirm start date, pay and reporting line	HR	14 days before	
☐				
☐				

Preboarding paperwork

Collect what payroll and compliance need while the new hire still has time to gather it.

Done	Task	Owner	When	Due date
☐	Send the new hire paperwork pack	HR	14 days before	
☐	Verify identity and right-to-work documents	HR	7 days before	
☐	Collect tax forms and bank details for payroll	Payroll	7 days before	
☐	Collect emergency contact details	HR	7 days before	
☐	Send the employee handbook for review	HR	7 days before	
☐	Share benefits options and enrollment deadlines	HR	5 days before	
☐				
☐				

Systems and setup

HR doesn't own all of these tasks, but it usually chases them.

Done	Task	Owner	When	Due date
☐	Request accounts and equipment from IT	HR	10 days before	
☐	Add the new hire to payroll	Payroll	5 days before	
☐	Add the new hire to the org chart and directory	HR	3 days before	
☐	Set up the new hire in your performance tool	HR	3 days before	
☐	Check the manager has a 30-60-90 day plan ready	HR	3 days before	
☐	Send the welcome email with day one logistics	HR	3 days before	
☐				
☐				

Day one

Run a short HR orientation and collect any signatures that are still missing.

Done	Task	Owner	When	Due date
☐	HR welcome and orientation session	HR	Day one	
☐	Collect any outstanding signed documents	HR	Day one	
☐	Walk through benefits, leave and pay dates	HR	Day one	
☐	Confirm the new hire can sign in to the HR system	IT	Day one	
☐	Explain how to raise questions or concerns with HR	HR	Day one	
☐				
☐				

First 30 days

Close out compliance items and check in on how the new hire is settling in.

Done	Task	Owner	When	Due date
☐	Send the week one onboarding survey	HR	Day 7	
☐	Complete mandatory compliance training	New hire	Day 14	
☐	Collect signed policy acknowledgments	HR	Day 14	
☐	Confirm benefits enrollment is complete	HR	Day 30	
☐	Check the first payroll run is correct	Payroll	Day 30	
☐	30-day HR check-in with the new hire	HR	Day 30	
☐				
☐				

Days 31 to 90

Gather feedback and prepare for the probation decision.

Done	Task	Owner	When	Due date
☐	Send the 30-day onboarding survey	HR	Day 31	
☐	Remind the manager about the 60-day goal review	HR	Day 56	
☐	Schedule the probation review meeting	HR	Day 74	
☐	Hold the probation review meeting	Manager	Day 88	
☐	Record the probation outcome in your HRIS	HR	Day 88	
☐	Send the 90-day onboarding survey	HR	Day 88	
☐				
☐				

Document tracker

Tick each document when it arrives and again once it's verified. Store the documents themselves in your HRIS.

Document	Received	Verified	Date
Signed offer letter	☐	☐	
Signed employment contract	☐	☐	
Proof of identity	☐	☐	
Right-to-work documents	☐	☐	
Tax forms	☐	☐	
Bank details for payroll	☐	☐	
Emergency contact form	☐	☐	
Confidentiality agreement or NDA	☐	☐	
Background check result (if applicable)	☐	☐	
Benefits enrollment forms	☐	☐	
Equipment agreement	☐	☐	
Handbook acknowledgment	☐	☐	
	☐	☐	
	☐	☐	

Policy acknowledgments

Record when each policy was shared and tick it once the employee has signed.

Policy	Shared on	Signed	Signed on
Employee handbook		☐	
Code of conduct		☐	
Anti-harassment policy		☐	
Data privacy and security policy		☐	
IT acceptable use policy		☐	
Health and safety policy		☐	
Remote or hybrid work policy		☐	
Leave and time-off policy		☐	
		☐	

Day one HR orientation

A one-hour agenda. Edit the times and topics to match your company.

Time	Topic
0:00	Welcome and introductions
0:10	How the company is organized and who does what
0:20	Pay dates, payroll and expenses
0:30	Benefits, leave and time off
0:40	Key policies and where to find them
0:50	How to reach HR and raise concerns

Onboarding surveys

Send a short survey at each point. These questions work well as a starting set.

- How clear was the information you got before day one?
- Did you have the equipment and access you needed on day one?
- How well do you understand what's expected of you in your role?
- How likely are you to recommend working here to a friend? (0 to 10)

Week one survey

Sent Score Responded ☐

Key feedback and action taken

Day 30 survey

Sent Score Responded ☐

Key feedback and action taken

Day 90 survey

Sent Score Responded ☐

Key feedback and action taken

Probation review

Complete at the end of the probation period and file a signed copy in the employee record.

Probation end date

Review date

Outcome

☐ Confirmed

☐ Extended

☐ Not confirmed

If extended, new end date

Summary of performance

Agreed next steps

Sign-off

Name	Role	Signature	Date
	Employee		
	Manager		
	HR		

Run HR onboarding inside Microsoft Teams

Teamflect keeps onboarding tasks, surveys, 1:1s and probation reviews in one place inside Microsoft Teams. See how it works at teamflect.com.