

New Employee Onboarding Checklist

Comprehensive year-one plan from pre-offer through annual review

Employee Name:

Date:

Pre-Offer Acceptance		
Action	Who Will Complete Action	Date Completed
Send offer letter. Should include position, title, salary, etc. (see sample templates on HR website).		
Pre-Hire Preparation		
Action	Who Will Complete Action	Date Completed
Complete new hire forms and submit hiring paperwork to HR and Payroll.		
Send a department welcome letter to the new employee confirming position, title, salary, supervisor, and when and where to report.		
Call the new employee to confirm receipt of the welcome letter and confirm start date, location, and arrival details.		
Send an internal memo to the department announcing the new employee's arrival date and responsibilities.		
Ensure cleanliness and order of the work area. Set up office space with phone, computer, supplies, and office keys.		
Order and install telephone, phone number, and voicemail access.		
Arrange for computer login and password setup, email setup, and any required software installation.		
Develop a department welcome and orientation binder.		
Register employee for company orientation. Confirm benefits packets are distributed at the orientation event.		
Select and train an orientation buddy.		
Create a schedule that includes introduction to the orientation buddy, required training, attendance at company orientation, and meetings with the supervisor and colleagues.		
Coordinate a meaningful first work assignment.		
Arrange a team lunch with the supervisor for the first day of work.		

New Hire Introductions: First Day

Action	Who Will Complete Action	Date Completed
Greet the employee and introduce them to co-workers and work areas.		
Introduce the employee to the orientation buddy and explain the buddy role.		
Review information provided in the department orientation binder.		
Review the job description and expectations.		
Assign the first project or assignment and schedule a follow-up meeting.		
Review the first week schedule of activities.		
Take the staff member to the ID office and parking department.		
Hold a welcome lunch with the supervisor and orientation buddy.		

New Hire Introductions: First Week

Action	Who Will Complete Action	Date Completed
Review the company's mission, vision, and guiding principles.		
Ensure the employee understands the relationship between their job, the department, and the organization.		
Review job responsibilities and expectations across 30, 60, and 90 days. Cover work relationships and key policies.		
Review department priorities and key projects for the coming year.		
Have the employee complete online workplace safety training relevant to position and work location.		
Host a welcome celebration with the department.		
Develop a department personnel file. If the employee is an internal transfer, obtain the personnel file from the previous department.		

New Hire Orientation: First Month

Action	Who Will Complete Action	Date Completed
Ensure the employee attends company orientation. Provide the staff handbook.		
Follow up with the employee after orientation to ensure understanding of critical messages and expectations.		
Encourage the employee to take advantage of cultural events, learning programs, and unique benefits offerings.		

Department Orientation: 30, 60, 90 Days

Action	Who Will Complete Action	Date Completed
Meet regularly with the employee to answer questions and ensure acclimation.		
Conduct 30 and 60 day meetings with the supervisor to review questions and establish performance expectations and goals.		
Obtain a signed copy of the Staff Handbook Acknowledgement of Receipt and Confidentiality Agreement.		
Ensure the employee has signed up for benefits within 30 days of the date of hire.		
Conduct the 90 day evaluation meeting and form. Decide whether to recommend successful completion, a 30 day extension, or discharge.		
Assess the department's orientation process and encourage feedback from the employee.		
Review and determine the employee's professional development plan for the coming year.		

Ongoing Onboarding: After 90 Days through First Year

Action	Who Will Complete Action	Date Completed
Schedule and conduct a 120 day meeting with the supervisor to review progress against performance expectations and goals.		
Review and implement professional development opportunities.		
Conduct mid-year performance evaluation.		
Conduct annual performance evaluation.		