

New Employee Onboarding Checklist



Being prepared on an employee's first day is important for the new hire and the company as well. This checklist will help you cover the HR needs of onboarding a new team member!



Take the following steps to ensure a smooth onboarding of all new employees:

- Schedule new hire orientation
- Set-up or order equipment and technology items (computer, phone, keys, etc.)
- Prepare the following new hire documents:
 - Offer letter and job description
 - Form I-9
 - Form W-4
 - Confidentiality agreement
 - Emergency contact information
 - Benefit enrollment forms
 - Employee handbook
 - Direct deposit form
 - Organizational chart
 - Phone list and office map
 - Safety instructions
 - Personnel action form
 - State-required new hire pamphlets
 - Other state or local documentation requirements
 - Any other materials a new employee would find useful on the first day

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- Conduct new hire orientation/onboarding process with the following steps:
 - Review and discuss new hire paperwork
 - Schedule or conduct safety training
 - Provide tour and introductions with the manager
 - Provide information on company logistics, including workstation location, break rooms, and restrooms
 - Provide instructions for phone and computer access
 - Sign agreements for security access and keys
 - Explain timekeeping requirements
 - Explain organization structure (provide organization chart and job description)
 - Discuss company mission, vision, values, and goals
 - Schedule time for the employee to read and sign the handbook
 - Describe company products and services
 - Describe benefits of working at the company (employee benefits, job opportunities, etc.)

- Upon completion, review new hire paperwork for completeness and accuracy
- Create personnel and confidential file folders
- Process new hire paperwork as needed and update human resource information system
- Provide payroll with a copy of the employee's Form W-4, direct deposit information (if applicable), and other necessary information
- Working with benefit providers to enroll employees in elected benefits
- Schedule first-day lunch with the manager or co-workers, and assign an onboarding "buddy" to help the new employee get acquainted with the company