



Accounting Team Onboarding Checklist

Administrative & IT Setup

Initial tasks for hardware provisioning, software access, and workstation configuration.

Onboarding Start Date

Employee Full Name

Hardware Provided

- ☐ Laptop
- ☐ Monitor
- ☐ Keyboard/Mouse
- ☐ Headset

Software Access Granted

- ☐ ERP System
- ☐ Email/Communication Tools
- ☐ Expense Management Software
- ☐ Password Manager
- ☐ Time Tracking Software

Signed IT Policy Agreement

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IT Manager Approval

Compliance & Regulatory Training

Essential training regarding internal controls, data privacy (GDPR/SOC2), and industry-specific regulations.

Completed Compliance Modules

- ☐ Anti-Money Laundering (AML) Training
- ☐ Data Privacy & GDPR Compliance
- ☐ Internal Fraud Prevention Training
- ☐ SOX (Sarbanes-Oxley) Compliance Overview
- ☐ Tax Regulation & Filing Standards

Date of Training Completion

Enter date...

Training Notes & Observations

Write something...

Upload Training Certificates

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Employee Acknowledgment of Compliance Standards

Accounting Software & ERP Access

Provisioning permissions for the ERP, accounting modules, and connected financial tools.

Software Modules Required

- ☐ Accounts Payable
- ☐ Accounts Receivable
- ☐ General Ledger
- ☐ Fixed Assets
- ☐ Payroll
- ☐ Tax Management

Access Level

- ☐ Read-Only
- ☐ Standard User
- ☐ Administrator

Access Provisioning Date

Enter date...

Username/Employee ID

Write something...

Access Confirmation Screenshot

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IT/Manager Approval Signature

Financial Process Familiarization

Reviewing the company's specific Chart of Accounts, month-end close cycles, and reporting hierarchies.

Review Completed Modules

- ☐ Chart of Accounts Overview
- ☐
- ☐ Intercompany Reconciliation Process
- ☐ Revenue Recognition Policy
- ☐ Fixed Asset Capitalization Workflow

Key Financial Contacts

Accounting Manual Acknowledgment

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Training Completion Date

Manager Approval

Internal Workflow & Communication

Understanding approval workflows, documentation standards, and team communication protocols.

Communication Channels Accessed

- ☐ Slack/Microsoft Teams
- ☐ Company Email
- ☐ Project Management Tool (Work OS)
- ☐ Internal Wiki/Knowledge Base

Reporting Line Confirmation

- ☐ Direct Manager Assigned
- ☐ Department Head Assigned

Review of Approval Hierarchy

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Workflow Training Completion Date

Enter date...

Key Stakeholders Identified

Write something...

Employee Acknowledgment

Documentation & Audit Trail Standards

Instructions on how to maintain supporting documentation and follow the paperless audit trail process.

Standard Operating Procedure (SOP) Review Completion

- ☐ Completed
- ☐ In Progress
- ☐ Not Started

Documented Financial Records Reviewed

- ☐ Bank Statements
- ☐ Invoices & Receipts
- ☐ Journal Vouchers
- ☐ Tax Filings
- ☐ Audit Reports

Signed Acknowledgement of Documentation Standards

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Date of Training Completion

Enter date...

Notes on Identified Documentation Gaps

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Manager Approval of Compliance Training

Initial 30-60-90 Day Milestones

Specific performance goals and learning objectives for the new hire's first three months.

First Month Learning Objective

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30-Day Review Date

Enter date...

Current Proficiency Level

- ☐ Learning
- ☐ Applying
- ☐ Proficient
- ☐ Expert

60-Day Autonomy Goal

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Completed Training Modules

- ☐ Chart of Accounts Review
- ☐ Software Navigation
- ☐ Compliance Training
- ☐ Month-End Close Procedure

Manager Approval