



# Employee Onboarding Checklist Template

 Show only Checklist

Display Style  
Default 

## Pre-Start Paperwork & Background Checks

Ensuring all necessary documentation is completed and background checks are finalized before the employee's first day.

### Offer Acceptance Date

Enter date...

### Offer Details/Summary

Write something...



### Background Check Vendor

- Vendor A
- Vendor B
- Internal Team

### Copy of Driver's License (if applicable)

 Upload File

### Copy of Social Security Card (if applicable)

 Upload File

### I-9 Verification Status

- Completed
- Pending
- Not Started

### Employee Signature (Offer Acceptance)

## First Day Welcome & Logistics

Tasks related to welcoming the new employee and ensuring they have the basic resources they need.

### New Employee Name

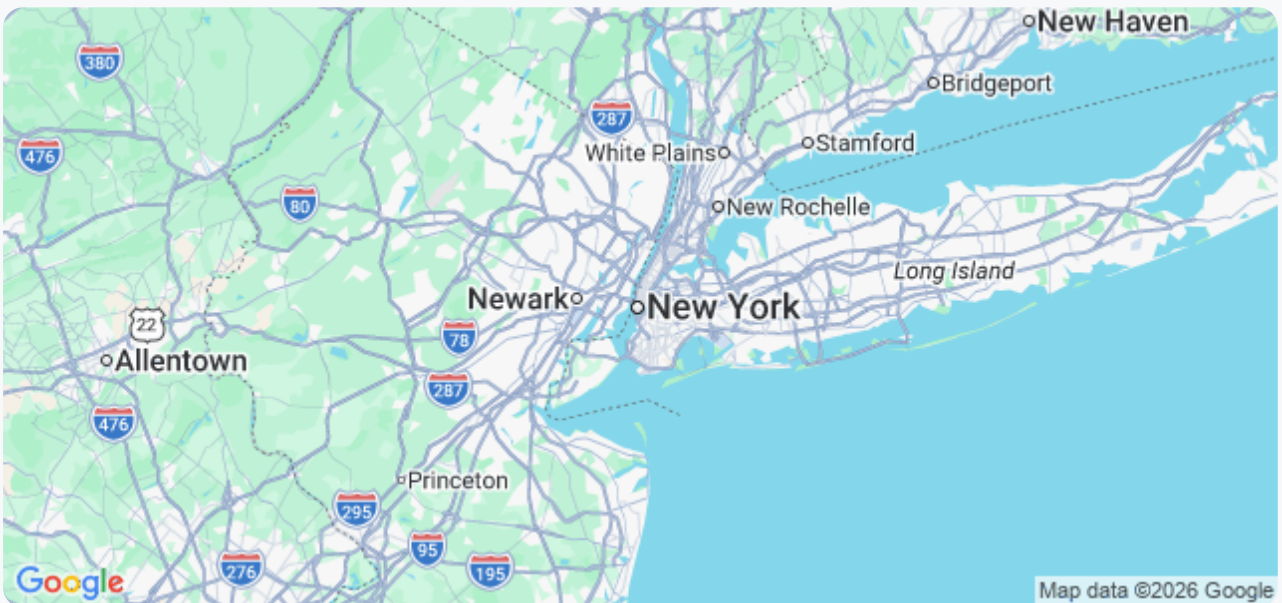
Write something...

## Start Date

## Scheduled Arrival Time

## Workstation Location

 [Set My Current Location](#)



### Welcome Message (to be displayed)

Write something...

### Welcome Package Items (check all that apply)

- Company Swag
- Employee Handbook
- Department Contacts List
- Parking Pass
- Welcome Letter

### Manager Signature (Confirmation of Welcome)

## IT & Systems Access

Setting up the employee's accounts, email, software access, and hardware.

### Employee Username

Write something...

### Temporary Password (Provided)

Write something...

### Laptop Asset Tag Number

Enter a number...

### Operating System

- Windows
- macOS
- Linux

### Software Access Granted

- Microsoft Office
- Adobe Creative Cloud
- Salesforce
- VPN Access

### Email Account Creation Date

Enter date...

### Special Software Installation Notes

Write something...

# HR & Policy Review

Reviewing essential HR policies, benefits enrollment, and legal compliance requirements.

## I-9 Form Verification Status

- Completed & Verified
- In Progress
- Not Started

## W-4 Form Verification Status

- Completed
- Not Started

## Employee Handbook Acknowledgement

- Acknowledged
- Not Acknowledged

## Benefits Enrollment Deadline

Enter date...

## Summary of Key Policy Discussions

Write something...

## Employee Signature - Policy Acknowledgement

# Department & Team Introduction

Introducing the new hire to their team, manager, and key stakeholders within the department.

## Team Introductions - Brief Description

Write something...

## Introduced to Manager?

Yes

No

## Introduced to Direct Team Members?

Yes

No

## Introduced to Key Stakeholders (Select all that apply)

Marketing

Sales

Finance

Engineering

Customer Support

### Date of Team Introductions

Enter date...

### Notes on Introductions - Any observations or feedback?

Write something...

## Training & Development - Initial Phase

Scheduling and completing initial training sessions and role-specific onboarding.

### Mandatory Compliance Training Completed?

- Yes
- No
- In Progress

### Summary of Initial Role-Specific Training Received

Write something...

### Date of Initial Software Training

Enter date...

### Topics Covered in Initial Training (Select all that apply)

- Company Culture
- Product Overview
- Department Procedures
- Software Tutorials
- Security Protocols

### Number of Training Hours Completed

Enter a number...

### Trainer Feedback & Notes

Write something...

## 30-Day Check-in

Reviewing progress, addressing questions, and providing feedback after the initial month.

### Overall Impression of Role Fit

- Excellent
- Good
- Fair
- Needs Improvement

### Key Accomplishments in First 30 Days

Write something...

### Challenges Encountered & Support Needed

Write something...

### Estimated Workload – Comfortable, Overwhelmed, or Underutilized (1-5)

Enter a number...

### Understanding of Company Culture

- Very Clear
- Clear
- Somewhat Clear
- Not Clear

### Next Performance Check-in Date

Enter date...

# 90-Day Review & Goal Setting

Formal performance check-in, reviewing goals, and providing ongoing support.

## Review Date

Enter date...

## Overall Performance Summary

Write something...

## Strengths Observed

Write something...

## Areas for Improvement

Write something...

### Specific Goals for Next 90 Days

Write something...

### Goal Completion Percentage Target (e.g., 80%)

Enter a number...

### Employee's Self-Assessment of Performance

- Exceeds Expectations
- Meets Expectations
- Needs Improvement

### Employee Signature

### Manager Signature

## Ongoing Support & Resources

Ensuring continuous access to resources and support for long-term success.

### Notes on ongoing check-in frequency & style

Write something...

### Available Resources (check all that apply)

- Mentorship Program
- Internal Knowledge Base
- Training Modules
- Employee Assistance Program (EAP)
- Performance Review Platform

### Next Performance Review Date

Enter date...

### Contact Person for Ongoing Support

Write something...

### Employee Satisfaction - Initial Feedback (Optional)

- Very Satisfied
- Satisfied
- Neutral
- Dissatisfied
- Very Dissatisfied