



Employee Onboarding Checklist Template

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

Offer Details/Summary

Background Check Vendor

- Vendor A
- Vendor B
- Internal Team

Copy of Driver's License (if applicable)

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...

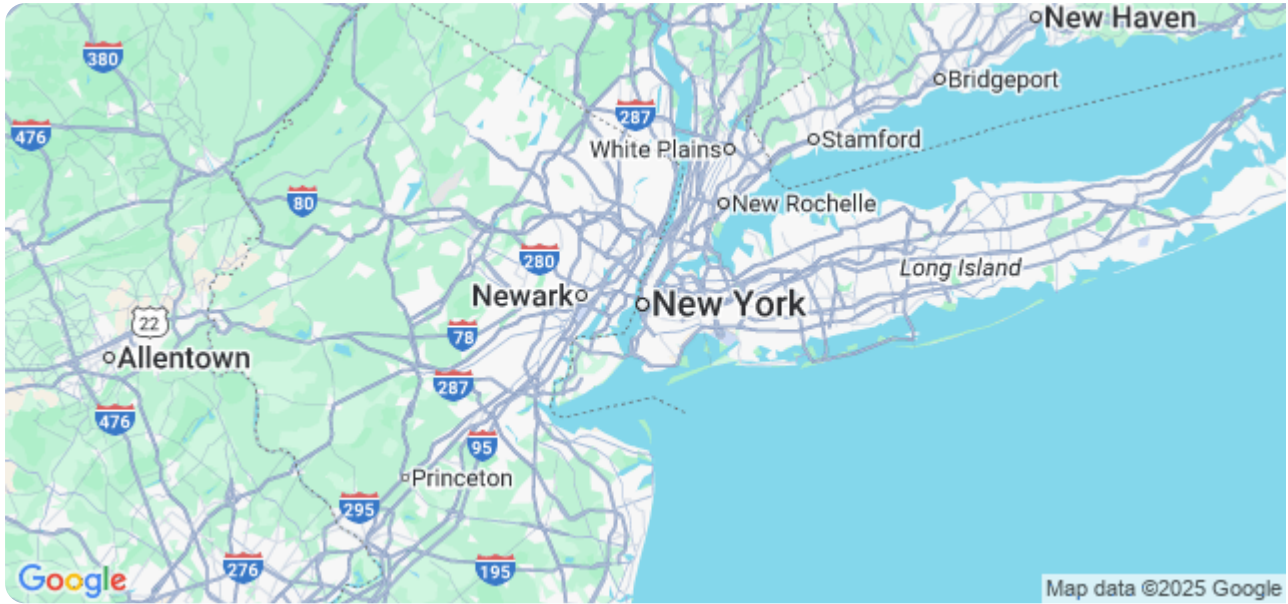
Start Date

Enter 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