



New Employee Training Workflow & Task Checklist 2026

Pre-Boarding & IT Setup

Essential tasks to complete before the employee's first day, including hardware provisioning, account creation, and workspace preparation.

Official Start Date

New Hire Full Name

Hardware Requirements

- ☐ Laptop (MacBook)
- ☐ Laptop (Windows)
- ☐ Monitor
- ☐ Keyboard & Mouse Set
- ☐ Headset

Work Arrangement

- ☐ On-site
- ☐ Remote
- ☐ Hybrid

Signed Employment Contract

 Upload File

Special Software/Access Instructions

Write something...

Day One: Orientation & Compliance

Initial onboarding steps including office tours, introduction to company culture, signing of essential legal documents, and policy reviews.

Orientation Start Date

Enter date...

Employee Full Name

Write something...

Compliance Documents Signed

- ☐ Employment Agreement
- ☐ Non-Disclosure Agreement (NDA)
- ☐ Employee Handbook Acknowledgment
- ☐ Code of Conduct Agreement
- ☐ Tax Documentation (W-4/I-9)

Office Location Assignment

- ☐ Headquarters
- ☐ Remote
- ☐ Satellite Office

Signed ID Verification Document

 [Upload File](#)

Manager Completion Verification

Systems & Software Access Training

Step-by-step guidance for mastering internal tools, CRM access, communication platforms, and task management software.

Software Access Granted

- ☐ Email & Calendar (Google Workspace/Outlook)
- ☐ Project Management Tool (Asana/Jira/Monday)
- ☐ Internal CRM Access
- ☐ Company Communication Tool (Slack/Teams)
- ☐ Cloud Storage (Drive/Dropbox/SharePoint)
- ☐ Password Management Tool (LastPass/1Password)

Access Provisioning Completion Date

Enter date...

Assigned IT Support Contact

Write something...

Software Login Troubleshooting Notes

Write something...

Employee Acknowledgment of Digital Security Policy

Role-Specific Technical Training

Deep-dive training modules focused on specific job functions, departmental workflows, and technical skill assessments.

Key Process Competency

Write something...

Training Notes & Observations

Write something...

Training Completion Date

Enter date...

Completed Certification/Assessment Proof

 Upload File

Trainer Verification Signature

Departmental Integration & Team Introduction

Tasks focused on meeting key stakeholders, understanding cross-functional dependencies, and establishing communication protocols.

Key Stakeholder Names

Write something...

Required Introductory Meetings Completed

- ☐ Direct Manager 1-on-1
- ☐ Department Head Introduction
- ☐ Peer Buddy/Mentor Meeting
- ☐ Cross-functional Partner Sync
- ☐ HR/Operations Check-in

Initial Team Integration Deadline

Enter date...

Communication Protocol Notes

Write something...

Manager Confirmation

First Week Performance Milestones

Early-stage objectives and learning checkpoints to ensure the new hire is navigating their primary responsibilities effectively.

Initial Milestone Completion Status

- ☐ Not Started
- ☐ In Progress
- ☐ Completed

Primary Weekly Objective Achieved

Write something...

Milestone Review Date

Enter date...

Manager's Feedback on First Week Performance

Write something...

Competencies Demonstrated

- ☐ Tool Proficiency
- ☐ Team Communication
- ☐ Workflow Understanding
- ☐ Company Policy Adherence

Employee Acknowledgment of Week 1 Progress

30-60-90 Day Review & Feedback Loop

Scheduled evaluation periods to assess training effectiveness, address knowledge gaps, and finalize long-term integration.

30-Day Review Completion Date

Enter date...

Training Progress Status

- ☐ On Track
- ☐ Needs Improvement
- ☐ Delayed

Competencies Mastered

- ☐ Software Proficiency
- ☐ Internal Communication Protocols
- ☐ Core Job Functions
- ☐ Compliance & Security Standards

Manager Feedback & Observations

Write something...

Employee Self-Assessment Score (1-10)

Write something...

Manager Acknowledgment

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