NEW HIRE CHECKLIST

This checklist sets out the onboarding tasks for _____, who joins _____ (the "Company") as _____ and starts work on _____. Each task names the person responsible for it and the date it is due.

1. NEW HIRE DETAILS

Employee: _____. Job title: _____. Department: _____.

Manager: _____. Start date: _____.

Work arrangement (check one): [ ] on-site [ ] remote [ ] hybrid (on-site and remote) [ ] part-time [ ] seasonal or temporary.

Work location or city and state worked from: _____. Usual schedule: _____. Expected end date (seasonal): _____.

Paperwork contact: _____. Equipment and accounts contact: _____. Onboarding buddy: _____.

2. BEFORE DAY ONE

[ ] Signed offer letter or employment agreement on file. Owner: _____. Due: _____.

[ ] Background check disclosure given and written authorization signed (if an outside agency prepares the report). Owner: _____. Due: _____.

[ ] Background check completed (if used). Owner: _____. Due: _____.

[ ] Start date, arrival time, work location and first-day schedule sent to the new hire. Owner: _____. Due: _____.

[ ] Workspace, building access and equipment ready, or equipment shipped to a remote employee: _____. Owner: _____. Due: _____.

[ ] Email and system accounts created. Owner: _____. Due: _____.

[ ] Employee record set up in the payroll system. Owner: _____. Due: _____.

[ ] Onboarding buddy assigned and introduced. Owner: _____. Due: _____.

[ ] Team told about the new hire’s role and start date. Owner: _____. Due: _____.

3. FIRST DAY

[ ] Form I-9, Section 1 completed and signed by the employee. Owner: _____. Due: no later than the first day of employment.

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[ ] Form I-9, Section 2 completed: identity and employment authorization documents examined. Owner: _____. Due: within 3 business days of the first day of work for pay (the first day, if the job lasts less than 3 business days).

[ ] E-Verify case created (if the Company uses E-Verify). Owner: _____. Due: no later than the third business day after the employee starts work for pay.

[ ] Form W-4 completed and signed. Owner: _____. Due: _____.

[ ] State income tax withholding form completed, if the state where the employee works uses one. Owner: _____. Due: _____.

[ ] Direct deposit form completed, if the employee chooses direct deposit. Owner: _____. Due: _____.

[ ] Emergency contact information collected. Owner: _____. Due: _____.

[ ] Employee handbook received and acknowledgment signed. Owner: _____. Due: _____.

[ ] Tour of the workplace, or welcome video call, and introductions to the team. Owner: _____. Due: _____.

[ ] Safety orientation completed: emergency exits, how to report an injury, and any protective equipment. Owner: _____. Due: _____.

[ ] Security setup for remote access completed: _____. Owner: _____. Due: _____.

[ ] Remote work policy received and acknowledged. Owner: _____. Due: _____.

[ ] Job duties, work hours and first-week schedule reviewed. Owner: _____. Due: _____.

4. FIRST WEEK

[ ] Role expectations and first goals discussed. Owner: _____. Due: _____.

[ ] First one-on-one meeting held. Owner: _____. Due: _____.

[ ] Introductions to key colleagues and other teams. Owner: _____. Due: _____.

[ ] First meeting with the onboarding buddy. Owner: _____. Due: _____.

[ ] Required training scheduled: _____. Owner: _____. Due: _____.

[ ] Benefits information and enrollment instructions given. Owner: _____. Due: _____.

[ ] Work schedule, or in-office and remote days, confirmed. Owner: _____. Due: _____.

[ ] New hire report sent to the new hire reporting program of the state where the employee works. Owner: _____. Due: within 20 days after hire (sooner if the state requires).

[ ] Payroll details checked before the first paycheck. Owner: _____. Due: _____.

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5. FIRST 30 DAYS

[ ] 30-day check-in meeting held. Owner: _____. Due: _____.

[ ] Required training completed. Owner: _____. Due: _____.

[ ] Feedback from the employee on the onboarding process collected. Owner: _____. Due: _____.

[ ] Goals for days 31 to 90 set. Owner: _____. Due: _____.

6. DAYS 31 TO 60

[ ] 60-day check-in meeting held. Owner: _____. Due: _____.

[ ] Progress on goals reviewed and adjusted. Owner: _____. Due: _____.

7. DAYS 61 TO 90

[ ] 90-day review meeting held. Owner: _____. Due: _____.

[ ] Goals for the next review period set. Owner: _____. Due: _____.

[ ] Onboarding checklist completed and filed. Owner: _____. Due: _____.

8. OTHER TASKS

[ ] _____. Owner: _____. Due: _____.

[ ] _____. Owner: _____. Due: _____.

[ ] _____. Owner: _____. Due: _____.

9. NOTES

_____

_____

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