New Hire Checklist

A complete onboarding checklist for employers, from the signed offer to the 90-day review. Tick each task, note the date it was done, and keep the finished checklist with the employee's onboarding records.

Employee name		**Start date**	
Job title		**Department**	
Hiring manager		**Buddy or mentor**	
HR contact		**Work location / state**	
Work arrangement	[ ] On-site [ ] Hybrid [ ] Remote	**Employment type**	[ ] Full-time [ ] Part-time [ ] Temporary

Owners HR = human resources or payroll · MGR = hiring manager · IT = IT or tech support · OFF = office or facilities · BUD = buddy or mentor · EMP = new employee
US items are marked (US). If you hire outside the US, swap them for the forms and filings your country or region requires.

1. Offer and Pre-Start

Start as soon as the candidate says yes.

	Task	Owner	When	Done
☐	**Send a written offer letter** Job title, pay and pay frequency, start date, schedule, work location, reporting manager, and any conditions such as a background check.	HR	Offer stage	
☐	**Receive the signed offer letter or employment agreement** Store it in the employee file before any preboarding starts.	HR	Before preboarding	
☐	**Run background, reference or drug checks your policy requires** Get the candidate's written consent first. In the US, background checks through a screening company follow FCRA disclosure and consent rules (US).	HR	Before start date	
☐	**Tell other finalists the role is filled** Close the job posting and the requisition.	HR	After acceptance	
☐	**Confirm start date, work arrangement, and pay details in writing** Check that payroll, the manager, and IT all have the same start date.	HR	After acceptance	

2. Preboarding: Two Weeks Before Start

Set up systems and people so nothing waits on day one.

	Task	Owner	When	Done
☐	**Create the employee record in your HR and payroll systems** Legal name, address, job code, pay rate, department, manager, and start date.	HR	2 weeks before	
☐	**Send the new-hire paperwork packet electronically** Tax forms, direct deposit, emergency contacts, handbook, and policy acknowledgments, so the first day isn't spent on forms.	HR	2 weeks before	
☐	**Invite the employee to complete I-9 Section 1 early, if you allow it (US)** Section 1 can be completed after the offer is accepted, and no later than the first day of work.	HR	After acceptance	

	Task	Owner	When	Done
☐	**Order equipment** Laptop, monitor, phone, headset, keyboard, mouse, and any role-specific tools or uniform.	IT	2 weeks before	
☐	**Request accounts and access** Email, calendar, chat, HR portal, and role tools. Grant only the access the role needs.	IT	2 weeks before	
☐	**Arrange building access** ID badge, keys, parking permit, and visitor pass for day one if the badge isn't ready.	OFF	1–2 weeks before	
☐	**Prepare the workspace** Desk, chair, supplies, and a clean, working setup.	OFF	1 week before	
☐	**Assign and brief a buddy or mentor** Pick someone outside the reporting line who has time to help. Share the start date and plan.	MGR	2 weeks before	
☐	**Write a 30-60-90 day plan** First goals, first project, the people to meet, and how success will be measured.	MGR	1–2 weeks before	
☐	**Book first-week meetings** Manager 1:1s, team introduction, HR orientation, and key stakeholders.	MGR	1 week before	
☐	**Plan training** Role training, shadowing, and required compliance courses, with dates.	MGR / HR	1 week before	
☐	**Announce the new hire to the team** Name, role, start date, and one or two lines of background they're happy to share.	MGR	1 week before	
☐	**Update the org chart, directory, and team distribution lists**	HR / IT	Before day one	
☐	**Prepare a welcome kit (optional)** A note from the manager, company swag, and a one-page "who's who."	MGR	Before day one	

3. Preboarding: The Week Before

	Task	Owner	When	Done
☐	**Send the welcome message** Start date, arrival time, address, entrance and parking, dress expectations, who to ask for, and the first-day agenda.	MGR	3–5 days before	
☐	**Tell the employee what to bring** ID documents for the I-9 (US), bank details for direct deposit, and anything role-specific.	HR	3–5 days before	
☐	**Confirm devices are set up and accounts work** Test logins, install software, and turn on security settings.	IT	2–3 days before	
☐	**Share the handbook and benefits summary to read ahead**	HR	Before day one	
☐	**Pick a first task or small project** Something they can finish in the first week.	MGR	Before day one	
☐	**Check in by phone or message** Answer questions and confirm they have everything for day one.	MGR	1–2 days before	

4. First Day

	Task	Owner	When	Done
☐	**Greet the employee on arrival or on a welcome video call** Have the manager or buddy there at the start time.	MGR	Start of day	
☐	**Give a workplace tour** Restrooms, kitchen, meeting rooms, emergency exits, first-aid kit, and the evacuation route.	BUD / OFF	Morning	
☐	**Introduce the team and the buddy**	MGR	Morning	
☐	**Hand over equipment and log in together** Set passwords, turn on two-factor login, and test email, chat, and key tools.	IT	Morning	
☐	**Complete I-9 Section 1 (US)** The employee completes Section 1 no later than the first day of work.	HR / EMP	By end of day	
☐	**Complete tax and payroll forms** Form W-4 (US), state withholding where required, direct deposit, and emergency contacts.	HR / EMP	Day one	
☐	**Walk through the first-week agenda** Meetings, training, and the first task.	MGR	Day one	
☐	**Team lunch or informal coffee**	MGR	Midday	
☐	**End-of-day check-in** What went well, what's unclear, and what's next tomorrow.	MGR	End of day	

5. First Week

	Task	Owner	When	Done
☐	**Complete I-9 Section 2 (US)** The employer reviews the documents and completes Section 2 within three business days of the first day of work.	HR	Within 3 business days	
☐	**Create the E-Verify case, if you're enrolled (US)** Create it by the third business day after the employee starts work for pay.	HR	Within 3 business days	
☐	**Report the new hire to your state (US)** Federal law requires the report within 20 days of hire. Some states require it sooner.	HR	Within 20 days	
☐	**Hold HR orientation** Pay schedule, timekeeping, overtime rules, PTO and sick leave, benefits, and who to contact for what.	HR	First week	
☐	**Collect signed policy acknowledgments** Handbook receipt, code of conduct, IT and acceptable-use policy, confidentiality or IP agreement.	HR / EMP	First week	
☐	**Explain benefits enrollment and its deadline** Plans, costs, eligibility date, and the enrollment window.	HR	First week	
☐	**Start required compliance training** Workplace conduct and harassment prevention, safety, and data security, as your state, industry, or policy requires.	HR	First week	
☐	**Start role-specific training and shadowing**	MGR	First week	
☐	**Meet key stakeholders outside the team**	MGR / BUD	First week	

	Task	Owner	When	Done
☐	**Agree on working norms** Hours, communication channels, response times, and how to request time off.	MGR	First week	
☐	**Review the 30-60-90 day plan together** Confirm the first-month goals.	MGR	First week	
☐	**End-of-week 1:1** Questions, blockers, and feedback on the first week.	MGR	End of week 1	

6. First 30 Days

	Task	Owner	When	Done
☐	**Hold weekly 1:1s**	MGR	Weekly	
☐	**Confirm benefits enrollment is complete or waived in writing**	HR	Within the plan window	
☐	**Finish required training and record completion dates**	HR	By day 30	
☐	**Confirm all tool and system access works** Fix any missing permissions found during real work.	IT	By day 30	
☐	**Deliver the first project or task**	EMP / MGR	By day 30	
☐	**Buddy check-in**	BUD	Weekly or biweekly	
☐	**30-day review** Progress against goals, what's clear, what's missing, and support needed.	MGR	Day 30	
☐	**Send a short onboarding survey** Ask what helped and what was confusing.	HR	Day 30	

7. Days 31–60

	Task	Owner	When	Done
☐	**60-day review** Progress against the plan. Adjust goals if the role has changed.	MGR	Day 60	
☐	**Give more ownership** Independent work and a larger project.	MGR	Days 31–60	
☐	**Fill training gaps found so far**	MGR / HR	Days 31–60	
☐	**Continue cross-team introductions**	MGR / BUD	Days 31–60	

8. Days 61–90

	Task	Owner	When	Done
☐	**90-day review** Results, strengths, areas to grow, and the end of any introductory period your policy sets.	MGR / HR	Day 90	
☐	**Set goals for the next quarter and a development plan**	MGR	Day 90	
☐	**Run the final onboarding survey**	HR	Day 90	

	Task	Owner	When	Done
☐	**Close the onboarding file** Confirm every form, acknowledgment, training record, and equipment receipt is on file.	HR	Day 90	
☐	**Update this checklist** Fix steps that were unclear, late, or missing.	HR	After day 90	

9. Remote and Hybrid Add-Ons

Use these alongside sections 2 to 8.

	Task	Owner	When	Done
☐	**Ship equipment with tracking and confirm delivery** Include setup instructions and a support contact.	IT	1 week before	
☐	**Confirm home-office setup** Internet speed, a quiet workspace, and any stipend or expense policy for equipment.	HR / MGR	Before day one	
☐	**Turn on security for remote work** VPN, two-factor login, password manager, device encryption, and safe Wi-Fi guidance.	IT	Before day one	
☐	**Plan the remote I-9 document review (US)** Review documents in person, through an authorized representative, or remotely only if your company qualifies for the DHS-authorized alternative procedure.	HR	Before day one	
☐	**Hold a welcome video call with the manager on day one**	MGR	Day one	
☐	**Agree on core hours and time zones** When the team overlaps and when meetings can be booked.	MGR	First week	
☐	**Tour the communication tools** Which channel for what, video etiquette, and where documents live.	BUD	First week	
☐	**Schedule virtual coffee chats with teammates**	BUD	First two weeks	
☐	**Hybrid only: explain office days, desk booking, badge access, and lockers**	OFF	First week	

10. Documents and Records

Collect only what applies to the employee's role and location, and store personal data securely.

	Task	Owner	When	Done
☐	**Signed offer letter or employment agreement**	HR	Before start	
☐	**Form I-9 (US)** Keep it for three years after the date of hire, or one year after employment ends, whichever is later. Many employers store I-9s apart from personnel files.	HR	Days 1–3	
☐	**Form W-4 and state withholding form (US)**	HR	Day one	
☐	**State new-hire report (US)**	HR	Within 20 days	
☐	**Direct deposit authorization**	HR	Day one	
☐	**Emergency contact form**	HR	Day one	
☐	**Benefits enrollment or waiver**	HR	Plan window	

	Task	Owner	When	Done
☐	**Handbook receipt and policy acknowledgments**	HR	First week	
☐	**Confidentiality, NDA, or IP assignment agreement** Use a non-compete only where it's lawful in the employee's state or country.	HR	Before start	
☐	**Background check consent and results** Store them confidentially and separately from the main file.	HR	Before start	
☐	**Licenses, certifications, and training records** Note expiry dates for renewal reminders.	HR	Before start	
☐	**Equipment and asset receipt** List serial numbers so you can collect them later.	IT	Day one	
☐	**Required federal, state, and local notices** Workplace posters and any pay or new-hire notices your state requires.	HR	Day one	

Notes

Sign-off

Employee _____ Date _____

Hiring manager _____ Date _____

HR _____ Date _____

US deadlines and record rules come from the USCIS Handbook for Employers (M-274), the E-Verify User Manual, IRS guidance on Form W-4, and federal new-hire reporting law (42 U.S.C. 653a). This checklist is general information, not legal advice. Requirements vary by state and country, so confirm them with your HR or legal advisor.