Checklist

First Engagement

- ☐ Obtain signed job acceptance
- ☐ Confirm start date
- ☐ Send new employee welcome email

Prepare new hire paperwork

- ☐ Tax forms
- ☐ Employment contract
- ☐ Non-disclosure, non-compete or other legal documents Employee handbook
- ☐ Benefits literature Job description

Procure devices and equipment

- ☐ Computer (including keyboard, mouse, etc.)
- ☐ Phone
- ☐ Access to shared devices (printer, copier, fax machine, etc.)
- ☐ Mobile phone, tablet, or other additional job-specific devices

Set up accounts and create logins

- ☐ Wi-Fi access Voicemail
- ☐ Email
- ☐ Time clock system
- ☐ Access to project management software or other job-specific technology
- ☐ Put in request for security clearance (if applicable) Add employee to relevant email distribution lists

Set up workspace

- ☐ Reserve an office, cubicle or workstation
- ☐ Ensure space has a desk, chair or other necessary office furniture Provide necessary office supplies
- ☐ Provide a branded welcome kit (if applicable)

First Day

- ☐ Greet new employee
- ☐ Provide card, badge or other security assets Perform building tour
- ☐ Introduce new hire to team
- ☐ Send announcement email Schedule team lunch
- ☐ Provide training plan

Checklist

Orientation

- Complete all new hire paperwork
- Discuss benefits and insurance plans Review employee handbook
- Review safety policies
- Review technology policies and support process
- Assign a peer mentor

Schedule check-in plan

- Obtain onboarding feedback
- Schedule one-week check-in
- Schedule 30-day check-in
- Schedule 60-day check-in
- Schedule 90-day check-in
- Schedule any further check-ins