

Employee Onboarding Checklist

Checklist · 27 items · 5 sections

A thorough employee onboarding process improves retention, performance, and engagement. This HR checklist covers everything from pre-boarding paperwork to 90-day check-ins: organized by phase so you never miss a critical step.

Open the editable version online:

<https://genechecklist.com/checklist/employee-onboarding-checklist>

PRE-BOARDING (BEFORE DAY 1)

- Send offer letter and collect signed acceptance
HIGH
- Initiate background check and reference verification
HIGH
- Collect completed I-9, W-4, and state tax withholding forms
HIGH
- Set up payroll and direct deposit
HIGH
- Prepare workstation: computer, email account, phone, and supplies
HIGH
- Grant access to necessary software, systems, and tools
HIGH
- Send welcome email with first-day logistics and parking info
HIGH
- Notify team of new hire: share name, role, and start date

FIRST DAY

- Greet new hire at door: give warm welcome
HIGH
- Give office/facility tour: restrooms, kitchen, exits, meeting rooms
HIGH
- Introduce to teammates, manager, and key stakeholders
HIGH
- Walk through benefits enrollment: health, dental, 401(k)
HIGH

- Review employee handbook and company policies
HIGH
- Review job description, role expectations, and 30-60-90 day goals
HIGH
- Have lunch with the team or manager

FIRST WEEK

- Complete required compliance and safety training
HIGH
- Set up 1:1 meetings with key colleagues
HIGH
- Assign a buddy or mentor for the first 30–90 days
- Review workflows, processes, and tools for the role
HIGH
- Check in daily at end of day: answer questions, remove blockers
HIGH

FIRST MONTH

- Set 30-60-90 day goals in writing with manager
HIGH
- Complete 30-day check-in with HR and manager
HIGH
- Confirm benefits elections are finalized before enrollment deadline
HIGH
- Collect feedback from new hire on onboarding experience

60–90 DAYS

- Complete 60-day performance check-in
HIGH
- Complete 90-day review: assess performance against goals
HIGH
- Confirm new hire is fully integrated and performing independently
HIGH