



# Employee Onboarding Checklist Template

This template helps your HR team manage onboarding tasks, ownership, and progress in one place.

## How to use this checklist?

Use this employee onboarding checklist to track every task during the onboarding process. Assign one owner per task, set clear deadlines, and mark each item as completed.

## PREBOARDING (Before Start Date)

✓	Task	Owner	Deadline	Notes
<input type="checkbox"/>	Send the offer letter & collect the signature	HR	Before the start date	
<input type="checkbox"/>	Complete Form I-9 (Section 1)	Employee	Before the start date	
<input type="checkbox"/>	Prepare W-4 and state tax forms	HR	Before the start date	
<input type="checkbox"/>	Set up payroll and direct deposit	HR	Before the start date	
<input type="checkbox"/>	Create an employee profile in the HR system	HR	Before the start date	
<input type="checkbox"/>	Create email and system access	IT	Before the start date	
<input type="checkbox"/>	Prepare or ship equipment	IT	Before the start date	

<input type="checkbox"/>	Share the employee handbook	HR	Before the start date	
<input type="checkbox"/>	Send a welcome email with start date details	HR	Before the start date	
<input type="checkbox"/>	Assign a manager and an onboarding buddy	HR	Before the start date	
<input type="checkbox"/>	Announce new hire internally	HR	Before the start date	

## FIRST DAY

✓	Task	Owner	Deadline	Notes
<input type="checkbox"/>	Welcome employee, and review the agenda	Manager	Day 1	
<input type="checkbox"/>	Complete the remaining paperwork	HR	Day 1	
<input type="checkbox"/>	Verify Form I-9 documents (Section 2)	HR	Within 3 days	
<input type="checkbox"/>	Confirm all logins and system access	IT	Day 1	
<input type="checkbox"/>	Run new hire orientation	HR	Day 1	
<input type="checkbox"/>	Introduce the team and key stakeholders	Manager	Day 1	
<input type="checkbox"/>	Provide company overview	HR	Day 1	
<input type="checkbox"/>	Review policies and the employee handbook	HR	Day 1	
<input type="checkbox"/>	Explain role expectations	Manager	Day 1	
<input type="checkbox"/>	Schedule initial meetings	Manager	Day 1	

## FIRST WEEK

✓	Task	Owner	Deadline	Notes
<input type="checkbox"/>	Schedule regular check-ins	Manager	Week 1	
<input type="checkbox"/>	Provide tool and system training	IT / Manager	Week 1	
<input type="checkbox"/>	Deliver role-specific training	Manager	Week 1	
<input type="checkbox"/>	Assign first tasks or projects	Manager	Week 1	
<input type="checkbox"/>	Share training materials	HR / Manager	Week 1	
<input type="checkbox"/>	Introduce workflows and processes	Manager	Week 1	
<input type="checkbox"/>	Arrange meetings with key team members	Manager	Week 1	
<input type="checkbox"/>	Clarify communication expectations	Manager	Week 1	
<input type="checkbox"/>	Set short-term priorities	Manager	Week 1	
<input type="checkbox"/>	Collect early feedback	HR	End of the week	

## FIRST 30 DAYS

✓	Task	Owner	Deadline	Notes
<input type="checkbox"/>	Define 30-day goals	Manager	Week 2	
<input type="checkbox"/>	Increase task complexity	Manager	Ongoing	
<input type="checkbox"/>	Hold weekly 1:1 meetings	Manager	Weekly	
<input type="checkbox"/>	Provide advanced training	Manager	Ongoing	
<input type="checkbox"/>	Review progress and adjust expectations	Manager	Day 30	
<input type="checkbox"/>	Identify skill gaps	Manager	Day 30	

<input type="checkbox"/>	Encourage team participation	Manager	Ongoing	
<input type="checkbox"/>	Gather onboarding feedback	HR	Day 30	

## 30-60-90 DAYS

✓	Task	Owner	Deadline	Notes
<input type="checkbox"/>	Set 30-60-90 day goals	Manager	Day 30	
<input type="checkbox"/>	Track performance progress	Manager	Ongoing	
<input type="checkbox"/>	Increase ownership of work	Manager	Ongoing	
<input type="checkbox"/>	Provide structured feedback	Manager	Biweekly	
<input type="checkbox"/>	Adjust responsibilities if needed	Manager	Ongoing	
<input type="checkbox"/>	Conduct a 90-day performance review	Manager	Day 90	

## AFTER 90 DAYS

✓	Task	Owner	Deadline	Notes
<input type="checkbox"/>	Conduct a performance review	Manager	After 90 days	
<input type="checkbox"/>	Set medium-term goals	Manager	After review	
<input type="checkbox"/>	Create a development plan	Manager	After review	
<input type="checkbox"/>	Continue regular 1:1s	Manager	Ongoing	
<input type="checkbox"/>	Provide training opportunities	HR	Ongoing	
<input type="checkbox"/>	Monitor engagement and satisfaction	HR	Ongoing	

