

New accountant onboarding checklist

ONBOARDING CHECKLIST TEMPLATE

Employee _____ Role _____ Start date _____
 Buddy or manager _____

Onboarding From the signed offer to the end of probation

TASK	DUE	DATE	INITIALS
Before day 1			
☐ Check their qualifications and professional body membership, as the role requires	Before day 1		
☐ Have them sign the confidentiality and independence declarations	Before day 1		
☐ Set up email, the practice management system and the document system Give access to client files only as their role needs.	Before day 1		
☐ Set up their access to the accounting and tax software	Before day 1		
Day 1			
☐ Introduce them to the partners, their manager and their buddy	Day 1		
☐ Explain the client list and service lines they'll work on	Day 1		
☐ Explain time recording, budgets and how jobs are billed	Day 1		
☐ Explain data security, phishing and how to report a breach	Day 1		
Week 1			
☐ Go through the firm's workpaper template and file naming	Week 1		
☐ Train on the workpaper review procedure and the self-review checklist	Week 1		
☐ Train on the month-end close checklist and bank feeds	Week 1		
☐ Explain how to request information from clients and chase records	Week 1		
☐ Give them a first job with a clear budget and a reviewer	Week 1		
Month 1			
☐ Go through the review notes on their first jobs with them	Month 1		
☐ Hold a 30-day check-in and agree goals	Month 1		
End of probation			
☐ Hold the probation review and confirm the outcome in writing	Month 3		
☐ Agree their training plan and continuing education needs	Month 3		

Completed by _____ Checked by (manager) _____ Date _____ Notes _____