

New hire 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			
☐ Send the employment contract and get it signed	Before day 1		
☐ Collect the tax, payroll, bank and emergency contact details	Before day 1		
☐ Check the right-to-work documents and any licenses or checks the role needs	Before day 1		
☐ Set up their email, logins and system access Give access only to what the role needs.	Before day 1		
☐ Get their equipment, uniform, keys or access card ready	Before day 1		
☐ Choose a buddy and tell the team who's starting	Before day 1		
☐ Send a welcome message with the start time, place, dress code and first-week plan	Before day 1		
Day 1			
☐ Welcome them and give a tour of the workplace	Day 1		
☐ Introduce them to the team and their buddy	Day 1		
☐ Run the health and safety induction Exits, first aid, how to report an incident, and any hazards in the role.	Day 1		
☐ Go through the key policies and have them sign that they've read them	Day 1		
☐ Check every login and piece of equipment works	Day 1		
☐ Explain the role, what good looks like, and the first week's plan	Day 1		
☐ Check in at the end of the day	Day 1		
Week 1			
☐ Train them on the core procedures of the role Use your SOPs, so everyone learns the same way.	Week 1		
☐ Have them shadow an experienced colleague	Week 1		
☐ Give them a first task they can complete on their own	Week 1		
☐ Hold an end-of-week check-in Ask what's unclear, and fix anything that slowed them down.	Week 1		
Month 1			
☐ Check all required training is complete and passed	Month 1		
☐ Hold a 30-day review and agree goals for the next two months	Month 1		
☐ Ask for their feedback on onboarding	Month 1		
End of probation			
☐ Hold the probation review and confirm the outcome in writing	Month 3		
☐ Update their training record and file	Month 3		

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