

# ONBOARDING

# CHECKLIST

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| Preboarding stage |
|  | **Complete** |
| Collect signed offer letter |  |
| Confirm start date |  |
| Send welcome communication to the employee’s email |  |
| Assemble new hire paperwork |  |
| * Tax forms
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| * Employment contract
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| * Legal documents — including non-disclosure and non-compete forms
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| * Employee handbook
 |  |
| * Benefits information and forms
 |  |
| Gather equipment |  |
| * Computer or laptop
 |  |
| * Mouse and keyboard — if necessary
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| * Power cord
 |  |
| Create company accounts |  |
| * Email
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| * Timecard system
 |  |
| * CRM and other project management systems
 |  |
| Reserve office or workspace |  |
| Gather and assemble desk and chair |  |
| Add new employee to organizational email and mailing lists |  |
| Announce new hire through an all-company email |  |

This onboarding checklist is divided into three stages: preboarding, training, and follow-through. The onboarding process should begin at least one week prior to an employee’s official start date.

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| Training stage |
|  | **Complete** |
| Provide new employee with security clearance |  |
| Introduce managers and team members |  |
| Give facility tour |  |
| Set up a training plan with employee |  |
| Complete new hire paperwork |  |
| Review employee handbook |  |
| Update the employee on safety policies |  |
| Assign mentorship — if applicable |  |
| Answer benefits and training questions |  |
| Schedule team lunch or meet-and-greet |  |

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| Follow-through stage |
|  | **Complete** |
| Check-in with new employee consistently |  |
| * After one week
 |  |
| * After one month
 |  |
| * After two months
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| * After three months
 |  |
| * After trial period
 |  |
| Conduct an onboarding survey — if applicable |  |
| Provide access to professional development training |  |

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