**ONBOARDING CHECKLIST (TEMPLATE)**

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date of Hire: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Reports to: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Remote or Onsite:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\*\*IF ONSITE, DESK LOCATION: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\*\*

**Upon Acceptance:**

IT Notified

Email sent to NH regarding mac/pc preferences and office (home or onsite) needs

Ops/Facilities/Safety Notified

Finance Notified

Benefits Administrator Notified

**Two Weeks Prior to Start:**

Send welcome email (template) with parking/start time/general first day info (meeting schedule, ***what to expect***, lunch info) ***Request I-9 docs be ready for Day 1*!**

Invites to any near-term company events sent to personal email (within 2 weeks of start date)

**One Week Prior to Start:**

Laptop sent home in advance or set-up in appropriate office/cube ***OR*** ***both***

Parking Badge Created (if applicable)

Day 1 Meeting w. HR scheduled (benefits/onboarding docs/culture/ways to get involved)

1:1 Meeting with direct manager scheduled

Direct reports meetings scheduled (1:1s)

Meeting w. CEO scheduled (brief org history/ review current goals)

Core Team meetings scheduled

Safety training scheduled

Company holidays/events added to calendar

Added to all recurring appropriate/required meetings

Hiring Manager list meetings here: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**For Day 1** ***STANDARD***:

First two week’s “calendar at a glance” sent electronically to personal email and work email

Org Chart, Pipeline, recent all company updates waiting in inbox (as appropriate)

Companywide email announcement

LinkedIn/Social Media posts

Added to birthday/anniversary spreadsheet

Access granted to DropBox with link to NEW HIRE FOLDER

Meeting w. HR (review onboarding docs/culture/ways to get involved)

**For Day 1 *ONSITE*:**

Desk set up ready with Badge/Swag/Pens/Paper/Covid test/tissues/hand sanitizer

Office/Lab tour scheduled WITH **\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Lunch scheduled WITH\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**For Day 1 *REMOTE*:**

e-gift card for Uber eats to order Day 1 lunch

**For Payroll:**

Payroll spreadsheet updated

W4 scanned in to files

Direct Deposit form completed

**Employment Information:**

Signed Offer Letter CV on file

Signed Confidentiality/Non-Compete Agreement Personnel & Benefits Folders Created

I-9 Form w/documents received I-9 information received

Employee Handbook Acknowledgement

**Benefits Enrollment:**

Medical/Dental forms Enrolled in Life/LTD/STD/ADD

BCBS WAIVER (if declining) Life/LTD/STD/ADD Beneficiary form

HRA Direct Deposit form for HRC Life/ADD EOI form (over $100,000)

FSA/HSA Enrollment (as applicable) 401(k) Enrollment Info/Passcode

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| --- |
| **COMMENTS/NOTES:** |
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Completed by: Date:

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

HR

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PAYROLL

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HIRING MANAGER