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# 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 |  |
| * Employment contract |  |
| * Legal documents — including non-disclosure and non-compete forms |  |
| * Employee handbook |  |
| * Benefits information and forms |  |
| Gather equipment |  |
| * Computer or laptop |  |
| * Mouse and keyboard — if necessary |  |
| * Power cord |  |
| Create company accounts |  |
| * Email |  |
| * 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.

|  |  |
| --- | --- |
| 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 |  |
| * After three months |  |
| * After trial period |  |
| Conduct an onboarding survey — if applicable |  |
| Provide access to professional development training |  |

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