

TEMPLATE

New Hire Onboarding Checklist

A step-by-step checklist to get a new employee productive and compliant

Work through these before, during, and after the first day. Check each item as you go. Adapt to your company and confirm state-specific items.

Employee details

New hire name: _____

Role / manager: _____

Start date: _____

Before day one

- Send signed offer letter and confirm start date
- Collect new-hire paperwork and complete Form I-9 (within 3 business days of start)
- Report the new hire to your state (usually within ~20 days)
- Set up payroll and benefits enrollment
- Confirm correct classification: exempt vs non-exempt, employee vs contractor
- Order equipment and create system accounts
- Prepare a first-week schedule and assign a point person

First day

- Welcome and workspace or remote setup walkthrough
- Review the employee handbook and collect signed acknowledgment
- Complete I-9 verification if not already done
- Cover key policies: pay, time off, conduct, reporting procedure
- Introduce the team and key contacts
- Confirm access to systems and tools

First week

- Set clear 30-day expectations and goals
- Schedule recurring one-on-ones with the manager
- Assign initial training and first real task
- Confirm benefits enrollment is complete
- Check in on setup and answer open questions

First 30, 60, 90 days

- 30 days: check progress against initial expectations, gather feedback
- 60 days: review early performance, adjust goals
- 90 days: formal check-in, confirm fit, set next-quarter goals

The single biggest onboarding mistake at small companies is treating day one as the finish line. Structured 30-60-90 check-ins are what turn a new hire into a productive one and cut avoidable early turnover.