

# Employee Onboarding Checklist

A step-by-step guide from pre-boarding to the first 90 days (2026)

OnboardFlow  
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Employee Name	Position / Department	Start Date
Reporting Manager	Onboarding Buddy	HR Contact

## Pre-Boarding (Before Day 1)

### Documents to Collect

- ☐ Government-issued ID copy
- ☐ Tax identification number and tax forms
- ☐ Bank account details for payroll
- ☐ Emergency contact information
- ☐ Signed employment contract
- ☐ NDA / confidentiality agreements
- ☐ Benefits enrollment forms
- ☐ Educational certificates

### Internal Preparation

- ☐ Set up workstation & equipment
- ☐ Create email & system accounts
- ☐ Provision tool & platform access
- ☐ Prepare welcome kit & handbook
- ☐ Assign onboarding buddy / mentor
- ☐ Notify team of new hire & start date
- ☐ Schedule orientation meetings
- ☐ Prepare building access / badge

## Day 1

### Morning

- ☐ Welcome & team introductions
- ☐ Office tour (facilities, emergency exits)
- ☐ Review company mission, values, culture
- ☐ Walk through employee handbook
- ☐ Verify all pre-boarding docs are complete

### Afternoon

- ☐ IT setup — email, chat, tools, VPN
- ☐ Role expectations & goals with manager
- ☐ Communication norms (email / chat / meet)
- ☐ Org chart & key contacts
- ☐ Share first-week schedule

## First Week

- ☐ Mandatory training (security, privacy, policies)
- ☐ Shadow key team members
- ☐ Review current projects & priorities
- ☐ Set up weekly 1-on-1 with manager
- ☐ Confirm all system access works
- ☐ Introduce to cross-functional stakeholders
- ☐ Complete payroll & benefits registration

## Days 1–30: Learn & Adapt

- ☐ Complete all required training
- ☐ Understand team goals & individual KPIs
- ☐ Attend key recurring meetings
- ☐ Build cross-functional relationships
- ☐ Begin contributing to small tasks
- ☐ End-of-month check-in with manager

## Days 31–60: Contribute

- ☐ Take ownership of assigned work
- ☐ Participate in projects independently
- ☐ Identify process improvements
- ☐ Mid-point review — progress vs. goals
- ☐ Expand network across departments

## Days 61–90: Integrate

- ☐ Operate independently in core role
- ☐ Complete probationary review (if applicable)
- ☐ Confirm ongoing employment status
- ☐ Set next-quarter goals & dev plan
- ☐ Final onboarding review & feedback

## Compliance Reminders

- ☐ Tax withholding set up **Before 1st payroll**
- ☐ Social security / insurance registered **Check local deadline**
- ☐ Employment contract signed & filed
- ☐ Employee records created & maintained
- ☐ All mandatory training completed
- ☐ Probation review scheduled

## Common Pitfalls to Avoid

- ☐ Don't overload Day 1 — spread across the week
- ☐ Don't skip assigning a buddy / mentor
- ☐ Don't waste the pre-boarding window
- ☐ Don't use one-size-fits-all onboarding
- ☐ Don't stop check-ins after Week 1

### Notes