Template from signwren.com. General information, not legal advice. Check your state's rules and adapt it before you use it.

This checklist tracks onboarding. It is not Form I-9 or Form W-4 and does not replace them. Complete those on the official USCIS and IRS forms (or a system that meets their rules), and keep identity documents, tax details and bank information out of this checklist.

NEW HIRE ONBOARDING CHECKLIST

Employee: [Employee's full name]
Job title: [job title]
Department or location: [department or location]
Manager: [manager's name]
Onboarding contact (if different): [name, phone, email]
Offer accepted on: [date]
First day of work: [date]
Employment type: ☐ Full-time ☐ Part-time ☐ Seasonal or temporary

For each item, tick the box when it's done and fill in who did it and the date. Mark "N/A" for anything that doesn't apply.

1. Before the first day

Done	Item	Owner	Date
☐	Signed offer letter received and filed	[name]	[date]
☐	Background check authorization signed on its own stand-alone form, if a screening report will be used	[name]	[date]
☐	Background check or other contingencies cleared, if any	[name]	[date]
☐	Start date, start time, location and parking confirmed with the employee	[name]	[date]
☐	Welcome message sent with first-day schedule and who to ask for	[name]	[date]
☐	Form I-9 instructions and Lists of Acceptable Documents sent (Section 1 may be completed early once the offer is accepted)	[name]	[date]
☐	Workstation, keys or badge ready	[name]	[date]
☐	Computer, phone or tools ready: [list]	[name]	[date]
☐	Email and software accounts created: [list]	[name]	[date]
☐	Uniform or safety gear ordered, if needed	[name]	[date]
☐	Team told about the new hire and their start date	[name]	[date]

Done	Item	Owner	Date
☐	Other: [describe]	[name]	[date]

2. First day: paperwork

Done	Item	Owner	Date
☐	Form I-9 Section 1 completed and signed by the employee (due no later than the first day of employment)	Employee	[date]
☐	Form I-9 Section 2 completed by the employer (due within 3 business days of the first day of work for pay; by the first day if the job lasts less than 3 business days)	[name]	[date]
☐	Form W-4 completed by the employee and given to payroll	Employee / [name]	[date]
☐	State tax withholding form, if your state has one	Employee / [name]	[date]
☐	Direct deposit or other pay method set up	Employee / [name]	[date]
☐	Emergency contact form completed	Employee	[date]
☐	Employee handbook given and acknowledgement form signed (edition dated [date])	Employee / [name]	[date]
☐	Confidentiality, equipment or other company agreements signed: [list]	Employee / [name]	[date]
☐	Benefits information given, with enrollment deadline [date], if benefits apply	[name]	[date]
☐	Required state or local notices given: [list]	[name]	[date]
☐	Other: [describe]	[name]	[date]

3. First day: getting started

Done	Item	Owner	Date
☐	Welcome and tour of the workplace	[name]	[date]
☐	Emergency exits, first aid and safety procedures explained	[name]	[date]
☐	Keys, badge, equipment and logins handed over and working	[name]	[date]
☐	Work hours, breaks and timekeeping explained	[name]	[date]

Done	Item	Owner	Date
☐	Introduced to the team and to their buddy or point person: [name]	[name]	[date]
☐	Other: [describe]	[name]	[date]

4. First week

Done	Item	Owner	Date
☐	Job duties and expectations reviewed	[name]	[date]
☐	Main tools and systems training: [list]	[name]	[date]
☐	Payroll schedule, how to request time off and who approves it explained	[name]	[date]
☐	Key policies reviewed (for example safety, conduct, confidentiality, IT use)	[name]	[date]
☐	First assignment given: [describe]	[name]	[date]
☐	End-of-week check-in held	[name]	[date]
☐	Other: [describe]	[name]	[date]

5. First 30 days

Done	Item	Owner	Date
☐	New hire report sent to the State Directory of New Hires (federal deadline 20 days from hire; your state may require it sooner)	[name]	[date]
☐	Required training completed: [list]	Employee / [name]	[date]
☐	Goals for the first 90 days agreed	Employee / [name]	[date]
☐	30-day check-in held, with questions and feedback noted below	Employee / [name]	[date]
☐	Other: [describe]	[name]	[date]

6. Open items and notes

Items not yet complete, with who will finish them and by when:

[list open items, or write "None."]

Questions or feedback from the employee:

[notes]

7. Sign-off

By signing below, the employee confirms they received the items, information and training ticked above, and knows who to ask about anything that's unclear. The employer confirms the items ticked above were completed.

This checklist is a record of onboarding only. It is not an employment contract and does not change the terms of employment set out in the offer letter or any written employment agreement.

The parties agree this checklist may be signed electronically and in counterparts, and an electronic signature has the same effect as a handwritten one. (Form I-9 has its own federal rules for electronic signatures and is not signed through this checklist.)

Signatures

Employee
Signature: _____
Name: [full name]
Date: [date]

Employer
Signature: _____
Name: [full name]
Date: [date]