

Onboarding Checklist Template

A copy-paste onboarding checklist covering preboarding through the first year, for HR and hiring managers.

HOW TO USE THIS TEMPLATE

Fill in the New Hire Details header, then work each phase in order. Every task row carries four fields: **Task | Owner | Due/Timing | Status**. Check off each row as it is completed.

New Hire Details

Employee name	[Name]
Job title / role	[Role]
Start date	[Date]
Manager	[Name]
Onboarding buddy	[Name]

Preboarding / Before Day One

TASK	OWNER	DUE/TIMING	STATUS
Send paperwork and offer documents	HR	Before start	☐
Order equipment	IT	Before start	☐
Provision accounts and access	IT	Before start	☐
Set up the workspace	Manager	Before start	☐

First Day / Orientation

TASK	OWNER	DUE/TIMING	STATUS
Welcome and team intros	Manager	Day 1	☐
Office and facilities tour	Buddy	Day 1	☐
Hand over ID and access keys	IT	Day 1	☐
Review the handbook	HR	Day 1	☐
Complete compliance paperwork	HR	Day 1	☐

First Week

TASK	OWNER	DUE/TIMING	STATUS
Begin role-specific training	Manager	Week 1	☐
Meet the team	Manager	Week 1	☐
Assign a buddy	Manager	Week 1	☐
Set early expectations	Manager	Week 1	☐

First 30 Days / First Month

TASK	OWNER	DUE/TIMING	STATUS
Confirm role goals	Manager	Day 30	☐
First check-in	Manager	Day 30	☐
Clarify success criteria	Manager	Day 30	☐

First 90 Days

TASK	OWNER	DUE/TIMING	STATUS
Set 30/60/90 goals	Manager	Day 90	☐
90-day performance review	Manager	Day 90	☐
Culture immersion	Buddy	Day 90	☐

First Year / Ongoing Integration

TASK	OWNER	DUE/TIMING	STATUS
Six-month check	Manager	Month 6	☐
First-year review	Manager	Month 12	☐
Ongoing development	Manager	Ongoing	☐