

# Onboarding Checklist

Employee Name: \_\_\_\_\_

Position: \_\_\_\_\_

Start date: \_\_\_\_\_

Manager: \_\_\_\_\_

**PHASE 1:  
EMPLOYEE SET  
UP**

- Send welcome email to employee (with details of first day and any documents needing to be signed).
- Document any company property provided to employee.

**PHASE 2:  
PRIOR TO FIRST  
DAY**

- Request spotlight information to be used as an email to current staff to get to know the new face.
- Ensure all forms are signed (ie. offer letter, job summary, confidentiality agreement, emergency contact, etc.)
- Update emergency contact list with new employee's info.
- Notify IT to set up email account, add email to appropriate groups and order and set up any additional accounts and equipment needed.
- Gather company swag and post a welcome sign at workstation. Make sure workstation is clean and stocked with necessary items..
- Update birthday list and add date on company calendar.

**PHASE 3:  
FIRST DAY**

- Give new employee a tour of the facility.
- Introduce new employee to everyone.
- Go over onboarding materials: workplace violence, workplace safety, safe lifting, sexual harassment, any other applicable items.
- Go over lock up procedure and alarm system.

*After the first week check on employee ask if they have any questions, how their first week went, and see if they need additional introductions, etc.*