New starter onboarding checklist

> *A general template, not legal advice. Check it against local law and your own policies before you use it.*

The tasks that get a new starter ready, from before the first day through the first months, each with a named owner and a due date.

How to use this checklist

Copy this checklist for each new starter. Give every task a named owner and a due date, and add or remove tasks to suit the role. Keep the completed checklist in [where your company keeps employee records].

New starter name _____

Job title _____

Start date _____

Manager _____

Buddy (optional) _____

HR contact _____

Before the first day

- ☐ Send the signed offer and the employment contract, and confirm the start date, time and place.
- ☐ Collect the personal, pay and tax details [company name] needs for the employee record and payroll.
- ☐ Complete the identity or right-to-work checks [company name] carries out, where they apply.
- ☐ Create the employee record and add the new starter to payroll.
- ☐ Order equipment: [laptop, phone, access card, tools or uniform].
- ☐ Create accounts: email and [the systems and tools the role uses].
- ☐ Plan the first week and book the introductions.
- ☐ Choose a buddy and tell the team who is joining and when.
- ☐ Send a welcome message with the first-day details and who to ask for.

First day

- ☐ Welcome the new starter and introduce the team and the buddy.
- ☐ Hand over equipment and check that every sign-in works.
- ☐ Show the workplace or the online tools: [building tour, safety points, where to find things].
- ☐ Go through the key policies: [code of conduct, health and safety, data protection, leave].

- [ ] Confirm working hours and breaks, and how to record time and ask for leave.
- [ ] Collect any forms and signatures still outstanding.

First week

- [ ] Agree the goals for [the first period, for example the first weeks or months] with the manager.
- [ ] Arrange training for the role and time shadowing colleagues: [training plan].
- [ ] Complete the training [company name] asks every employee to take: [courses].
- [ ] Meet the people the role works with most.
- [ ] Check in at the end of the week: what is going well and what is missing.

First months

- [ ] Hold regular one-to-one meetings with the manager.
- [ ] Review progress against the agreed goals at [review point].
- [ ] Complete the probation review by [date], if your company uses one.
- [ ] Ask the new starter for feedback on how the onboarding went.
- [ ] Keep the completed checklist with the employee record.

Sign-off

Completed by _____

Date _____

Manager signature _____

Employee signature _____