

New Hire Checklist for HR

Task	Done	Not applicable	Note
New hire paperwork checklist			
Signed and documented offer letter and contract, outlining the terms and conditions of employment	<input type="checkbox"/>	<input type="checkbox"/>	
Tax forms	<input type="checkbox"/>	<input type="checkbox"/>	
Copies of identification documents (e.g., passport or driver's license)	<input type="checkbox"/>	<input type="checkbox"/>	
Emergency contact information	<input type="checkbox"/>	<input type="checkbox"/>	
Benefits enrollment forms (including health insurance, pension, and other benefit plans)	<input type="checkbox"/>	<input type="checkbox"/>	
Non-disclosure agreement (NDA) or confidentiality agreement	<input type="checkbox"/>	<input type="checkbox"/>	
Onboarding tasks			
Input new hire's information into the payroll system accurately	<input type="checkbox"/>	<input type="checkbox"/>	
Create profiles in the necessary internal systems	<input type="checkbox"/>	<input type="checkbox"/>	
Arrange office access cards or passwords	<input type="checkbox"/>	<input type="checkbox"/>	
Set up all IT accounts (including email accounts, software installations, and access to shared drives)	<input type="checkbox"/>	<input type="checkbox"/>	
Conduct health and safety training	<input type="checkbox"/>	<input type="checkbox"/>	
Welcome pack for new employee			
A company overview that includes mission, vision, values, and organizational structure	<input type="checkbox"/>	<input type="checkbox"/>	
An employee handbook outlining policies, procedures, and code of conduct	<input type="checkbox"/>	<input type="checkbox"/>	
The first week's schedule with a full orientation and introduction phase itinerary	<input type="checkbox"/>	<input type="checkbox"/>	
A directory of relevant team members, departments, and their roles	<input type="checkbox"/>	<input type="checkbox"/>	

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Welcome announcement for new employee			
Email or a notice on the intranet introducing the new hire, their role, and background	<input type="checkbox"/>	<input type="checkbox"/>	
A scheduled meeting with direct teammates and supervisors, either in person or virtually	<input type="checkbox"/>	<input type="checkbox"/>	
Add new employee to the organizational chart	<input type="checkbox"/>	<input type="checkbox"/>	
Mentorship or buddy system implementation			
Pair a new employee with a seasoned team member to ease the transition, and to offer guidance, insights, and a friendly point of contact	<input type="checkbox"/>	<input type="checkbox"/>	
Continuous feedback and support			
Schedule regular check-ins including HR and immediate supervisors during the first few months to provide continuous support and address any concerns	<input type="checkbox"/>	<input type="checkbox"/>	
A formal review after the initial 90 days to assess progress, alignment with company goals, and set further development plans	<input type="checkbox"/>	<input type="checkbox"/>	
Cultural integration and social engagement			
Provide insights into the company culture, traditions, and values through cultural onboarding sessions	<input type="checkbox"/>	<input type="checkbox"/>	
Organize informal gatherings or team-building activities to facilitate social integration within the team	<input type="checkbox"/>	<input type="checkbox"/>	
Professional development and training plans			
Depending on the role, lay out specific training or development courses that align with the job description and future growth within the organization	<input type="checkbox"/>	<input type="checkbox"/>	
Offer access to online platforms or in-house training materials to encourage continuous learning	<input type="checkbox"/>	<input type="checkbox"/>	

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Accessibility and inclusivity measures

Ensure that any specific requirements related to disabilities are addressed

Provide training on diversity and inclusivity to create a respectful and supportive environment

Exit strategy from the onboarding program

Create a planned transition from the onboarding program into full engagement with the team, marked by clear milestones and communicated expectations

Gather insights from the new hire on their experience with the onboarding process, for continuous improvement