

Onboarding Checklist



- Provide detailed job description
- Share signed offer letter
- Get pre-employment agreements signed
- Clean and prepare desk (keys, tech, swag, etc.)
- Set up phone
- Get laptop / computer ready
- Set up email (and add to office email lists)
- Set up software (create logins and temporary passwords)
- Send recurring meeting calendar invites
- Provide updated org and seating charts
- Assign office buddy (set coffee date)
- Send welcome email with pre-onboarding survey and first week expectations (parking, dress code, lunch arrangements, etc.)
- Get completed I-9 and W-4
- Enroll in timecard system and direct deposit
- Get completed emergency contact form
- Get completed benefit enrollment forms
- Send handbook and get signed acknowledgment
- Provide 6-week plan for role