

# NEW EMPLOYEE PRE-HIRE & PREP CHECKLIST

Stay organized and on track when making hiring decisions, and set the whole team up for success from the start.



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

**Job Title:** \_\_\_\_\_

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

**Target Start Date:** \_\_\_\_\_

## Pre-Hire Checklist:

Completed By:

- \_\_\_ ☐ Application / Resume
- \_\_\_ ☐ Verification of Employment
- \_\_\_ ☐ Reference Checking
- \_\_\_ ☐ Interview(s)
- \_\_\_ ☐ 1st: \_\_\_\_\_
- \_\_\_ ☐ 2nd: \_\_\_\_\_
- \_\_\_ ☐ Note: \_\_\_\_\_
- \_\_\_ ☐ Employment Offer Letter
- \_\_\_ ☐ Background check, if applicable
- \_\_\_ ☐ Credit check, if applicable & legally permissible
- \_\_\_ ☐ Request/Prep/Issue Employment Offer Letter
- \_\_\_ ☐ Disposition communication sent, if applicable

## New Hire Preparation Checklist:

Completed By:

- \_\_\_ ☐ Receipt of signed Employment Offer Letter
- \_\_\_ ☐ Prepare new hire paperwork
- \_\_\_ ☐ Procure devices/equipment/tools
- \_\_\_ ☐ Prepare office/workspace
- \_\_\_ ☐ Set up timekeeping, if applicable
- \_\_\_ ☐ Schedule/Coordinate new hire orientation
- \_\_\_ ☐ Schedule 30/60/90-day check-in plan
- \_\_\_ ☐ New Employee Onboarding Checklist initiated

Notes: \_\_\_\_\_

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# NEW EMPLOYEE ONBOARDING CHECKLIST

Make a great first impression by being organized and having everything prepped and ready for their first day on the job.



Employee Name: \_\_\_\_\_  
Job Title: \_\_\_\_\_

Manager: \_\_\_\_\_  
Hire Date: \_\_\_\_\_

## Before the First Day:

Completed By:

- \_\_\_\_ ☐ Prep workspace
- \_\_\_\_ ☐ Set up systems access
  - \_\_\_\_ ☐ Email, phones, permissions, software
- \_\_\_\_ ☐ Set up internal communication tools
- \_\_\_\_ ☐ Schedule/Send Welcome Aboard email
- \_\_\_\_ ☐ Notify team of new hire's arrival
- \_\_\_\_ ☐ Prep HR documents & paperwork
  - \_\_\_\_ ☐ Tax forms
  - \_\_\_\_ ☐ Direct Deposit
  - \_\_\_\_ ☐ Employee Handbook

## First Day:

- \_\_\_\_ ☐ Office tour & team introductions
- \_\_\_\_ ☐ Company overview
  - \_\_\_\_ ☐ Mission/Vision/Culture
  - \_\_\_\_ ☐ Organizational structure
- \_\_\_\_ ☐ Complete HR paperwork & compliance items
- \_\_\_\_ ☐ Review benefits & enrollment timeline
- \_\_\_\_ ☐ Review timekeeping procedures & pay schedule
- \_\_\_\_ ☐ Issue equipment & supplies
  - \_\_\_\_ ☐ Review usage policies
- \_\_\_\_ ☐ Provide training schedule
- \_\_\_\_ ☐ Walk through core tasks & responsibilities

## Compliance & Risk Mitigation:

- \_\_\_\_ ☐ I-9 Verification
- \_\_\_\_ ☐ E-verify, if applicable
- \_\_\_\_ ☐ Required notices provided (state/federal)
- \_\_\_\_ ☐ Confidentiality/NDA/Policy Acknowledgements

## Safety & Compliance:

For employers with safety exposure; see next page for industry-specific items

- \_\_\_\_ ☐ Review emergency procedures
- \_\_\_\_ ☐ Job-specific safety training completed
- \_\_\_\_ ☐ Acknowledgement of safety policies

## First Week:

Completed By:

- \_\_\_\_ ☐ Begin role-specific training
- \_\_\_\_ ☐ Discuss your management style & expectations
- \_\_\_\_ ☐ Discuss communication styles & expectations
- \_\_\_\_ ☐ Review job duties & KPIs
- \_\_\_\_ ☐ Review performance expectations & evaluations
- \_\_\_\_ ☐ Introduce workflow processes
- \_\_\_\_ ☐ Discuss safety procedures & policies
  - \_\_\_\_ ☐ Show/demonstrate safety equipment

## First 30 Days:

- \_\_\_\_ ☐ Review early assignments & provide feedback
- \_\_\_\_ ☐ Discuss goals for the next 60-90 days
- \_\_\_\_ ☐ Encourage participation in meetings & activities
- \_\_\_\_ ☐ Ensure benefits enrollment is complete
- \_\_\_\_ ☐ Set up informal check-in
  - \_\_\_\_ ☐ Answer questions
  - \_\_\_\_ ☐ Discuss how integration is going

## First 60-90 Days:

- \_\_\_\_ ☐ Conduct formal check-in or 90-day review
- \_\_\_\_ ☐ Revisit performance expectations
- \_\_\_\_ ☐ Discuss career development roadmaps
- \_\_\_\_ ☐ Identify additional training or support needed
- \_\_\_\_ ☐ Ensure integration with team & company

## On-the-Job Training:

- \_\_\_\_ ☐ First Day Training Date: \_\_\_\_\_
- \_\_\_\_ ☐ 2<sup>nd</sup> Week Follow-Up Date: \_\_\_\_\_
- \_\_\_\_ ☐ 30 Day Follow-Up Date: \_\_\_\_\_
- \_\_\_\_ ☐ 60 Day Follow-Up Date: \_\_\_\_\_
- \_\_\_\_ ☐ 90 Day Follow-Up Date: \_\_\_\_\_

# SAFETY & COMPLIANCE CHECKLIST

For roles with safety exposure, regulatory requirements, or operational risk. Customize to your specific requirements.



Employee Name: \_\_\_\_\_  
Job Title: \_\_\_\_\_

Manager: \_\_\_\_\_  
Hire Date: \_\_\_\_\_

## Safety Orientation

Completed By:

- \_\_\_\_ ☐ Review facility emergency procedures
- \_\_\_\_ ☐ Identify emergency exits, alarms, assembly points
- \_\_\_\_ ☐ Introduce incident/accident reporting procedures
- \_\_\_\_ ☐ Provide emergency contact numbers and internal escalation protocols

## Policies & Acknowledgements

- \_\_\_\_ ☐ Reviewed safety policies and procedures
- \_\_\_\_ ☐ Reviewed injury/illness reporting requirements
- \_\_\_\_ ☐ Reviewed drug/alcohol policies
- \_\_\_\_ ☐ Signed safety acknowledgment form
- \_\_\_\_ ☐ Retained in personnel file

## Job-Specific Safety Training

- \_\_\_\_ ☐ Completed role-specific hazard training
- \_\_\_\_ ☐ Reviewed Job Hazard Analysis (JHA) or equivalent
- \_\_\_\_ ☐ Demonstrated safe operation of tools, machinery, or systems
- \_\_\_\_ ☐ Validated employee competency

## Equipment & Environment Safety

- \_\_\_\_ ☐ Work area inspected for safety readiness
- \_\_\_\_ ☐ Equipment inspected and verified operational/safe
- \_\_\_\_ ☐ Ergonomic setup reviewed
- \_\_\_\_ ☐ Restricted areas and access limitations explained

## Personal Protective Equipment (PPE)

- \_\_\_\_ ☐ PPE requirements reviewed (what, when, why)
- \_\_\_\_ ☐ PPE issued
- \_\_\_\_ ☐ Proper use, care, and storage demonstrated
- \_\_\_\_ ☐ Employee fit-tested or sized

Notes: \_\_\_\_\_  
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