

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: _____

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: _____
- ____ ☐ 2nd 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: _____

