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The Complete
Employee Onboarding Checklist

How to Guide:
Using Employee Onboarding Checklists

Employee onboarding is essential to building a productive and engaged workforce. According to research by SHRM, a quality onboarding experience makes 69% of employees more likely to stay with a company for three years.

Our new employee onboarding checklist templates make it easy for HR and managers to provide a consistent and comprehensive onboarding experience. You can save each checklist to refer to every time you onboard a new employee, and customize the tasks to best support your organization's needs.

With Omni HR's all-in-one platform, you can digitize, customize, and automate your entire onboarding process on one, easy-to-use platform. Create action items, set automatic reminders, and easily track onboarding tasks for various new hires, so you can free up your valuable time for what matters most.

Learn how Omni HR helps streamline and standardize your onboarding process.

Book a demo

EMPLOYEE ONBOARDING CHECKLIST
FOR HR

BEFORE THE FIRST DAY

- [ ] Confirm start date
- [ ] Assign mentor
- [ ] Send new employee welcome email
- [ ] Send an internal email announcing the new employee arrival
- [ ] Prepare new hire paperwork
  (contract, tax forms, employee handbook, legal docs, benefits info)
- [ ] Procure devices and equipment
  (computers & log in info, additional job-specific devices)
- [ ] Set up accounts
  (email, access to job-specific technology, office key or ID card)
- [ ] Add employee to relevant email distribution lists
- [ ] Schedule a team lunch for new hire's first day

ON THE FIRST DAY

- [ ] Greet new employee & introduce to mentor
- [ ] Provide any security assets (ID card, etc.)
- [ ] Introduce new hire to team
- [ ] Send new hire announcement email
- [ ] Attend team lunch
- [ ] Assign training material
- [ ] Provide a new hire packet
- [ ] Schedule an end of the day check in

IN THE FIRST WEEK

- [ ] Schedule check in plan (30,60,90 days)
- [ ] Organize and schedule training (software, policies and procedures, etc.)
- [ ] Complete benefits enrollment
- [ ] Ensure all paperwork is completed
- [ ] Schedule a one-on-one meeting at the end of the week to check in

EMPLOYEE ONBOARDING CHECKLIST
FOR NEW HIRES

BEFORE THE FIRST DAY

- ☐ Read welcome email
- ☐ Complete new hire paperwork
  (contract, tax forms, employee handbook, legal docs, benefits info)
- ☐ Familiarize yourself with your commute
- ☐ Review employee handbook
- ☐ Gather any materials you'll need

ON THE FIRST DAY

- ☐ Introduce yourself to your team
- ☐ Log into accounts and set your preferences
- ☐ Familiarize yourself with your office & tools
- ☐ Begin trainings
- ☐ Ask questions!

IN THE FIRST WEEK

- ☐ Attend trainings & orientation
- ☐ Begin projects
- ☐ Enroll in benefits
- ☐ Complete new hire paperwork

EMPLOYEE ONBOARDING CHECKLIST
FOR MANAGERS

BEFORE THE FIRST DAY

- ☐ Prepare a schedule for your new hire's first week
- ☐ Add employee to your department/unit org chart
- ☐ Set up meetings with critical people for the employee's first weeks
- ☐ Add employee to relevant email distribution lists

ON THE FIRST DAY

- ☐ Welcome new hire upon arrival
- ☐ Provide an office tour and make introductions to the team
- ☐ Review policies and work expectations with new hire
- ☐ Host a welcome lunch
- ☐ Schedule an end of day check in

IN THE FIRST WEEK

- ☐ Check in with HR to ensure all new hire paperwork is complete
- ☐ Schedule trainings to introduce new hire to systems
- ☐ Get your employee started on a project
- ☐ Provide clear expectations, relevant tools, etc.
- ☐ Schedule an end of week check in

About Omni

Omni is an all-in-one HR management software on a mission to help modern companies build engaged, high-performing teams.

Until now, there is no employee management software that is built to holistically support the end-to-end employee lifecycle. Most HR teams and managers end up managing part (or all) of their people processes manually and losing valuable time syncing data across different teams and disjointed systems.

We believe that the world of work has changed – so we're building the tools for it.

Omni is creating a customizable all-in-one HR solution that adapts to how companies operate. We want to help organizations streamline their entire employee management lifecycle and turn complex, manual processes into intuitive, automated workflows.

With Omni, HR managers and business owners can free up valuable time to focus on what matters most for their business .

To see Omni in action, schedule a product tour, or visit us at https://omnihr.co/.

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