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The essential new hire checklist for managers

Congratulations! If you are reviewing this manager checklist, it's likely because a new teammate has joined your organization. Providing new employees with the right tools, communication and a smooth onboarding experience is essential in laying the foundation for a successful experience on your team.

In fact, a positive orientation can make all the difference in your company's retention rates, as more than half of voluntary turnover happens within 6 months of new hire's start date. Use this checklist as a handy guide to ensure you've covered the bases of everything a new hire will need to know in their first week through their first 90 days. While we are using best practices gleaned from hundreds of businesses, you should tailor this template based on your organization's needs. You can also access an Excel version of this template here.

Check Lists

Two weeks prior to start date

Depending on the size of your organization, the following tasks may fall into your court or HR's. Regardless, be sure to have this information collected *prior* to your new hire's first day to ensure you have the required documentation and can streamline applicable benefits and payroll.

Offer letter and employment agreement

- ☐ Offer letter sent and signed (confirm start date and salary)
- ☐ Background check completed (Learn more on background checks here)
- ☐ Employment agreement signed
- ☐ Drug screening passed (if applicable) (Learn more about drug screening tests here)

Employment details

- ☐ Employee contact information (address, cell, in case of emergency contact info)
- ☐ Obtain an employer identification number (EIN)
- ☐ W-4 **Federal** Tax Withholding Form
- ☐ W-4 **State** Tax Withholding Forms
- ☐ Employee I-9 form complete (confirms worker's eligibility to work in the U.S.)
  Verification documents can include:
  - ▪ Unexpired U.S. passport or passport card
  - ▪ Unexpired temporary resident card
  - ▪ Unexpired employment authorization card
  - ▪ Unexpired temporary resident card
- ☐ Submit employee information to State New Hire Reporting Agency
- ☐ Equal Opportunity Data From (Only needed for companies with more than 100+ employees. This varies depending on if your company handles federal contracts.)
- ☐ Direct deposit form
- ☐ Employee benefits enrollment forms
- ☐ Employee handbook review
- ☐ Policy documents handled (i.e. NDA or non-compete)

Pro Tip — *It can be quite daunting to collect and store the above information in an organized and compliant fashion. Learn how Zenefits' all-in-one People Platform collects, stores and manages all HR related information so you can get back to doing the work that you love.*

One week prior to start date

Even though your hire hasn't officially started, the week prior to their start date represents a critical prep time. This is when you'll build your schedule, begin building rapport and communication with their future colleagues, and provision the tools they'll need to have a fast and lasting impact.

Set a meeting schedule

- ☐ New hire training or onboarding (if applicable, connect with HR to ensure your new hire is included in their plans)
- ☐ Check-ins with your broader team to get introduced and connect on joint initiatives
- ☐ Check-ins with leadership to touch base and say welcome
- ☐ Cross-functional partners

    Pro Tip *— Reflect on the responsibilities of your new hire and brainstorm who will be key collaborators in their day to day. Set these meetings up early so your existing team has time to prepare.*

Provision required tools and equipment

- ☐ Computer and equipment (keyboard, mouse, monitor if applicable)
- ☐ Email account set up
- ☐ Add to appropriate email alias groups
- ☐ [Add to company calendar and relevant recurring meetings](#)
- ☐ Badge for building and office access (if applicable)
- ☐ Grant access to tools and systems (passcodes and/or accounts)

    Pro Tip *— Whether this action falls into your court or HR's, be sure to be thinking about integral tools early on. System access can take time, and you want to ensure early access so your new hire feels productive on day one.*

Send new hire welcome email

- ☐ Prepare and send new hire welcome email
  (more information on [new employee email available here](#))
    - ☐ Date and time of arrival
    - ☐ What to bring
    - ☐ Parking and building access
    - ☐ Who to ask for upon arrival
    - ☐ Dress code or appropriate attire
    - ☐ Office map and directions for how to enter your office
    - ☐ Attach employee handbook [(employee handbook template available here)](#)

First day checklist

A first day on the job is like any other first meeting – *first impressions matter!* By taking the time to go through the following, you'll lay a strong foundation for a great chapter with your team. Be friendly, organized, and efficient in your schedule – get started with the below.

☐ **Clean and set up desk or work space**
  ☐ Collect swag (if applicable) and include on desk or station setup. New hires love sporting new company gear!
  ☐ Arrange applicable equipment (computer, mouse, keyboard etc.)

☐ **Introduce your team**
  Pro Tip — *If you can get everyone together for a team meeting, play a friendly ice breaker. This can ease tension and allow your group to get to know one another without the stress of completing a task or deadline.*

☐ **Host your first check-in to go over:**
  ☐ The week's agenda
  ☐ Their role and key responsibilities
  Pro Tip — *This is a good time to give them a first assignment that they can be thinking about as connections are made.*
  ☐ Typical expectations about work hours, procedures for overtime, use of flexible work policies, vacation and sick leave

☐ **Take an office tour and highlight:**
  ☐ Fire exits
  ☐ Fire extinguisher
  ☐ Bathrooms
  ☐ Stations for clocking in/clocking out (if applicable)
  ☐ Smoking areas or smoking restrictions (if applicable)
  ☐ First aid areas
  ☐ Supervisor's office
  Pro Tip — *As you tour with your new hire, be sure to make introductions in person. It's always easier to draw connections in real life versus email — creating community is key to retention!*
  ☐ Other locations as they relate to safety procedures

First day check list continued

Technology

- ☐ Review how to operate telephone systems
- ☐ Note who to contact for repairs or IT support
- ☐ Arrange training dates for any new or unfamiliar technologies
- ☐ Required access codes (if applicable)
  - ☐ Point of sale and scheduling software
  - ☐ Customer relations training
  - ☐ How to log time and attendance for hourly workers (if applicable)
- ☐ Scheduling procedures and timelines (how to request change in schedule or shifts)
- ☐ Schedule 30-Day check-in session

Introduce company culture

- ☐ Assign a buddy
- ☐ Coordinate a welcome lunch
- ☐ Compile company information including values, mission, neighborhood or area map, contact information etc.
- ☐ Review organizational and reporting structure
- ☐ Explain dress code
- ☐ Review social media policy (if applicable)
- ☐ Create a list of who's who so your new hire knows who they'll be working with

First week checklist

Use the first week to ensure the proper policies and procedures are learned and absorbed, and to check in that your new hire is getting introduced to the culture and the tools they need.

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- ☐ Safety training
- ☐ Sexual harassment training
- ☐ Job training
- ☐ OSHA compliance training (if applicable)
- ☐ Review of employee handbook and guidelines
- ☐ Review of expense policy
- ☐ Review of HR point of contact and how to:
  - ▪ Request support
  - ▪ File a complaint
  - ▪ Navigate employee concerns
- ☐ Familiarity and comfort with role expectations and responsibilities
- ☐ Familiarity with navigating point of sale software, time and attendance procedures

First 30 days check-in

After a month, you and your new employee will have a better grasp on the workplace and working relationships. This is an important time to check in and review assignment completion, any blockers and needs for both employer and employee.

- ☐ [Review and record what's working well](#)
- ☐ Review and record what's not working well or needs attention
- ☐ Review performance with day-to-day systems and address any concerns
- ☐ Ensure employee has all necessary equipment, tools or resources required
- ☐ Examine first project or work product
- ☐ Solicit feedback from relevant managers and colleagues
- ☐ Solicit feedback on their onboarding experience and what went well and what could use more attention (and use for future onboarding!)
- ☐ [Schedule 90 day check-in meeting](#)

First 90 days check-in

At this point, creating routine meetings to touch base on employee performance and contentment on the job are critical to retention. Give feedback on how your new hire has been performing and address the following:

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Employee work performance
- ☐ Are tasks completed on time?
- ☐ Are tasks of quality?

What needs improvement
- ☐ Consider feedback from other employees and peers
- ☐ Consider areas of opportunity to help enhance the employee's performance

What's going well
- ☐ Tease out a project that they've contributed to and highlight their success
- ☐ Deliver positive feedback you've heard from others
- ☐ Ask what they've enjoyed working on and weave it into their next 90 days

A look at the next 90 days
- ☐ What does the employee need to be aware of in the coming weeks and months?
- ☐ [Goal set for how to achieve maximum potential](#)
- ☐ Plan for deadlines, initiatives and imminent changes