**[A blue and white sign

AI-generated content may be incorrect.](https://www.smartsheet.com/try-it?trp=8779&utm_source=template-word&utm_medium=content&utm_campaign=New+Hire+Onboarding+Checklist-word-8779&lpa=New+Hire+Onboarding+Checklist+word+8779)New Hire Onboarding Checklist Template Example**

|  |
| --- |
| **Name:** Mateus Tobin |
| **Job Title:** Marketing Coordinator |
| **Department:** Marketing |
| **Hiring Manager:** Olivia Carter |
| **Start Date:** MM/DD/YY |
| **Full Time / Part Time / Contract:** Full time |
| **Remote / In-Office Status:** Hybrid (3 days in-office, 2 days remote) |
| **Referral:** Employee referral program |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Preboarding Tasks** | | | | |
| Task | Assigned To | Due Date | Status | Notes |
| Send welcome email | Human Resources | MM/DD/YY | **Complete** | Included first-day agenda |
| Sign offer letter | Employee | MM/DD/YY | **Complete** | Filed in the HR system |
| Complete HR forms | Employee | MM/DD/YY | **Complete** | W-4, I-9, Direct Deposit |
| Complete IT setup | IT | MM/DD/YY | **Complete** | Email, laptop, and software access granted |
| Assign buddy/mentor | Human Resources | MM/DD/YY | **Complete** | Paired with Alexandra Mattson (Sr Associate) |
| Share company handbook | Human Resources | MM/DD/YY |  | Sent via employee portal |

|  |  |  |  |
| --- | --- | --- | --- |
| **First Day Tasks** | | | |
| Task | Assigned To | Status | Notes |
| Complete office tour / Virtual welcome | Human Resources | **Complete** | Completed in a hybrid format |
| Meet hiring manager | Manager | **Complete** | Discussed role expectations |
| Set up IT security and tools | IT | **Complete** | Access to project management tools |
| Conduct team introduction | Manager | **Complete** | Introduced during the team meeting |
| Have first lunch (if in-office) | Manager | **Complete** | Informal welcome lunch |
|  |  | **Complete** |  |
|  |  | **Complete** |  |
|  |  | **Complete** |  |
|  |  | **Complete** |  |
|  |  | **Complete** |  |
|  |  | **Complete** |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **First Week Tasks** | | | | |
| Task | Assigned To | Due Date | Status | Notes |
| Begin job training | Manager | MM/DD/YY | **Complete** | Started with onboarding modules |
| Do HR compliance training | Human Resources | MM/DD/YY | **Complete** | Completed DEI and safety training |
| Complete benefits enrollment | Employee | MM/DD/YY | **Complete** | Health, 401(k), and perks selected |
| Check in with buddy | Employee | MM/DD/YY | **Complete** | Discussed first-week experience |
| Check in with manager | Manager | MM/DD/YY | **Complete** | Reviewed initial impressions |
|  |  | MM/DD/YY |  |  |
|  |  | MM/DD/YY |  |  |
|  |  | MM/DD/YY |  |  |
|  |  | MM/DD/YY |  |  |
|  |  | MM/DD/YY |  |  |
|  |  | MM/DD/YY |  |  |

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **First 30/60/90 Days** | | | | | |
| Milestone | Task | Assigned To | Due Date | Status | Notes |
| 30 days | Performance check-in | Manager | MM/DD/YY | **Complete** | Received positive feedback |
| 30 days | Training progress review | Employee | MM/DD/YY | **Complete** | Completed core modules |
| 30 days | Team integration check | Manager | MM/DD/YY | **Complete** | Fully engaged with the team |
| 30 days | Employee self-assessment | Employee | MM/DD/YY | **Complete** | Shared feedback with HR |
| 60 days | Advanced job training | HR/Manager | MM/DD/YY | **Complete** | Marketing software training |
| 60 days | Expanded responsibilities | Manager | MM/DD/YY | **Complete** | Assigned a marketing campaign |
| 60 days | Peer feedback session | Human Resources | MM/DD/YY | **Complete** | Positive feedback |
| 60 days | Well-being and engagement survey | Human Resources | MM/DD/YY | **Complete** | Reported high job satisfaction |
| 90 days | Final performance review | Manager | MM/DD/YY | **Complete** | Exceeded expectations |
| 90 days | Career path discussion | Manager | MM/DD/YY | **Complete** | Set future growth goals |
| 90 days | Final onboarding feedback | Employee | MM/DD/YY | **Complete** | Suggested improvements |
| 90 days | Official onboarding completion | Human Resources | MM/DD/YY | **Complete** | Transitioned to full productivity |

|  |  |  |
| --- | --- | --- |
| **Required Documents** | | |
| Document | Submitted? | Notes |
| W-4 form | **No** | Required for payroll |
| I-9 form | **Yes** | Employment eligibility verified |
| Direct deposit form | **Yes** | Bank account setup is complete |
| Confidentiality agreement | **Yes** | Signed and filed |
| Handbook agreement | **Yes** | Acknowledged and signed |

|  |  |
| --- | --- |
| **Feedback** | |
| Question | Employee Response |
| What was the most helpful part of onboarding? | Clear structure and regular check-ins. |
| What could be improved? | More interactive training sessions. |
| Do you feel confident in your role? | Yes |
| Additional comments | I'm excited to contribute and grow with this team! |
|  |  |
|  |  |

|  |
| --- |
| **DISCLAIMER**  Any articles, templates, or information provided by Smartsheet on the website are for reference only. While we strive to keep the information up to date and correct, we make no representations or warranties of any kind, express or implied, about the completeness, accuracy, reliability, suitability, or availability with respect to the website or the information, articles, templates, or related graphics contained on the website. Any reliance you place on such information is therefore strictly at your own risk. |