**New Hire Onboarding Checklist Template Example**

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| **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 |

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| **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 |

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| **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** |  |
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| **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 |  |  |
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|  |  | MM/DD/YY |  |  |

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| **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 |

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| **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 |

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| **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! |
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