New Hire Onboarding Checklist (US)

Checklist · US · Updated 2026-07-13 · Square brackets are placeholders to replace with your own details.

A new hire onboarding checklist is the written list of everything a new employee must complete, be shown, and be trained on — before day one, on day one, and across the first month — with a sign-off against each item. It replaces "HR sends some forms and the manager wings it" with a single sequence both of them work from.

The first days carry the only hard federal deadlines in onboarding — Form I-9 chief among them — and they also set the pattern for everything after: a new hire onboarded properly is safer, productive sooner, and far more likely to stay past ninety days. When something goes wrong later, the signed checklist is often the document that shows what the person was actually told.

This checklist covers pre-start paperwork and setup, day one, the first week, and the first month, with the federal paperwork essentials called out so they cannot be missed.

Purpose and scope

This checklist sets out what every new hire at [Your company] completes, is shown, and is trained on, from offer acceptance to the end of the first month. It applies to all new employees, including part-time and temporary hires, adapted where noted for [role types].

The hiring manager owns completion; the new hire and manager sign each stage, and the completed checklist is filed as the onboarding record.

Federal paperwork essentials

- Form I-9: employee completes Section 1 by the first day of work for pay; [Your company] completes its section, with the employee's original documents, within 3 business days of the start date. [Name/role] owns this deadline. [If [Your company] uses E-Verify: create the case per current E-Verify rules.]
- Form W-4: collected before the first payroll so federal withholding is right from paycheck one.
- New-hire reporting: [name/role] reports the hire to [state] new-hire directory within the state's timeframe.
- State and local items: [state tax withholding form, required notices, and any local items — check your state and local authority and list them here].
- I-9s are stored [separately from personnel files, per current USCIS retention guidance] at [location/system].

Before day one

1. Send the offer letter and [employment agreement/handbook acknowledgment] for signature, and confirm the start date, time, location, dress code, and who will meet them — in writing.
2. Send the new-hire packet: Form W-4, [state withholding form], direct deposit form, emergency contacts, and benefits enrollment information [if applicable].

3. Tell the new hire which original documents to bring on day one for Form I-9, using the list of acceptable documents from USCIS — you may not specify which documents they choose.
4. Set up payroll, IT accounts, email, [system] access, door codes or keys, workstation, uniform, and PPE in their size where the role requires it.
5. Choose and brief a buddy who will be scheduled alongside the new hire in week one, and book the manager's calendar: day one, end-of-week-one review, and the 30-day review.
6. Prepare the day one plan hour by hour, with this checklist printed or loaded in [system] for signing as items complete.

Day one

1. Meet the new hire on arrival, complete Form I-9 Section 1 if not already done, and start the employer section if their documents are in hand — the 3-business-day clock is already running.
2. Run the workplace tour: their work area, restrooms, break area, first aid kit, fire exits, and the assembly point at [location].
3. Cover the safety essentials before any work: the alarm, evacuation routes, how to report an injury or hazard, and the specific hazards of their role with the controls that apply — [reference the job hazard analysis for the role].
4. Walk through the key documents for the role — [handbook, safety policies, cash handling, confidentiality] — signed as read where required.
5. Issue equipment and PPE, demonstrate anything they will use, and confirm they can use it safely before unsupervised use.
6. Introduce the team and the buddy, explain the schedule, breaks, timekeeping, and pay dates, and end the day with a 15-minute check-in.

First week

1. Complete the employer section of Form I-9 within 3 business days of the start date — verify [name/role] has signed it off before day three ends.
2. Confirm W-4, [state withholding], direct deposit, and new-hire reporting are all processed before the first payroll run.
3. Train the new hire on their core tasks against the relevant procedures, one at a time, with a sign-off per task: [task list for role].
4. Cover the policies that bite early: attendance and call-off procedure, phone use, [till/register rules], and anything role-specific.
5. Hold the end-of-week review: what is landing, what needs repeating, and what training comes next.

First month

1. Complete the remaining role training and record each sign-off: [modules/procedures].
2. Release the new hire to unsupervised work task by task, only as each sign-off completes.
3.

Confirm benefits enrollment happened within the plan's window [if applicable] and answer the first-paycheck questions — withholding surprises surface at paycheck one.

4. Hold the 30-day review against [the role expectations/introductory period criteria]: performance, attendance, training progress, and objectives for the next [60/90] days.
5. Ask the new hire what was missing from their onboarding — and feed the answer back into this checklist.

Records and review

The signed checklist, training sign-offs, and policy acknowledgments are filed in [system/location] and retained for [period]; I-9s are stored separately per current USCIS retention guidance. If it is not signed, it did not happen — that is how an auditor, insurer, or plaintiff's attorney will read it.

This checklist is reviewed [frequency], whenever federal or state forms change, and whenever a new hire's feedback exposes a gap. Owner: [name/role]. Next review due: [date].

How to use this template

1. Put real names and deadlines on the federal items first — Form I-9 within 3 business days is the one line on this checklist with a federal clock attached.
2. Add your state's items to the pre-start section: withholding form, required notices, new-hire reporting timeframe — check your state authority rather than assuming.
3. Strip the checklist to your reality: delete lines that do not apply and add the role-specific training that does.
4. Split day one by role type if your roles differ widely — a line cook and an office hire need different first hours.
5. Audit the last three completed checklists a month after adopting this: unsigned lines show you where the process is aspirational.

Official guidance

› USCIS — Form I-9, Employment Eligibility Verification

› IRS — About Form W-4

› DOL — Wage and Hour Division

› OSHA — Training resources