Pre-Onboarding Checklist

A pre-onboarding checklist can help employers ensure a smooth and organized onboarding process while preparing the new hire with confidence for success.

Prepare Welcome Materials:

- ☐ Send a welcome letter or congratulations email
- ☐ Send company handbook/policies and prepare any relevant forms (tax forms, emergency contact, compliance paperwork ahead of time.
- ☐ Prepare a welcome kit with company swag or essentials (notebook, mugs, t-shirts, totes, etc.)
- ☐ Include any relevant company information on workplace safety and policies

Prepare Workspace and Setup IT:

- ☐ Set up a workstation or office space
- ☐ Ensure necessary equipment (computer, phone, etc.) is ready
- ☐ Arrange for any required software or access permissions
- ☐ Ensure the new employee's email, computer, and other IT systems are set up
- ☐ Provide login credentials and necessary training

Communication and Coordination:

- ☐ Notify relevant teams or departments about the new hire
- ☐ Communicate the start date, time, dress code and location (if applicable)
- ☐ If applicable, provide information on parking or transportation options
- ☐ Share the first-day schedule, including who will be greeting them, a notice of team meetings, and what to expect during training sessions.

Benefits, Payroll, and HR Documentation:

- ☐ Verify that all required HR documents are ready
- ☐ Confirm completion of background checks and necessary paperwork
- ☐ Ensure the new hire is enrolled in benefits programs
- ☐ Confirm payroll details and provide necessary information
- ☐ Provide contact information for emergency situations