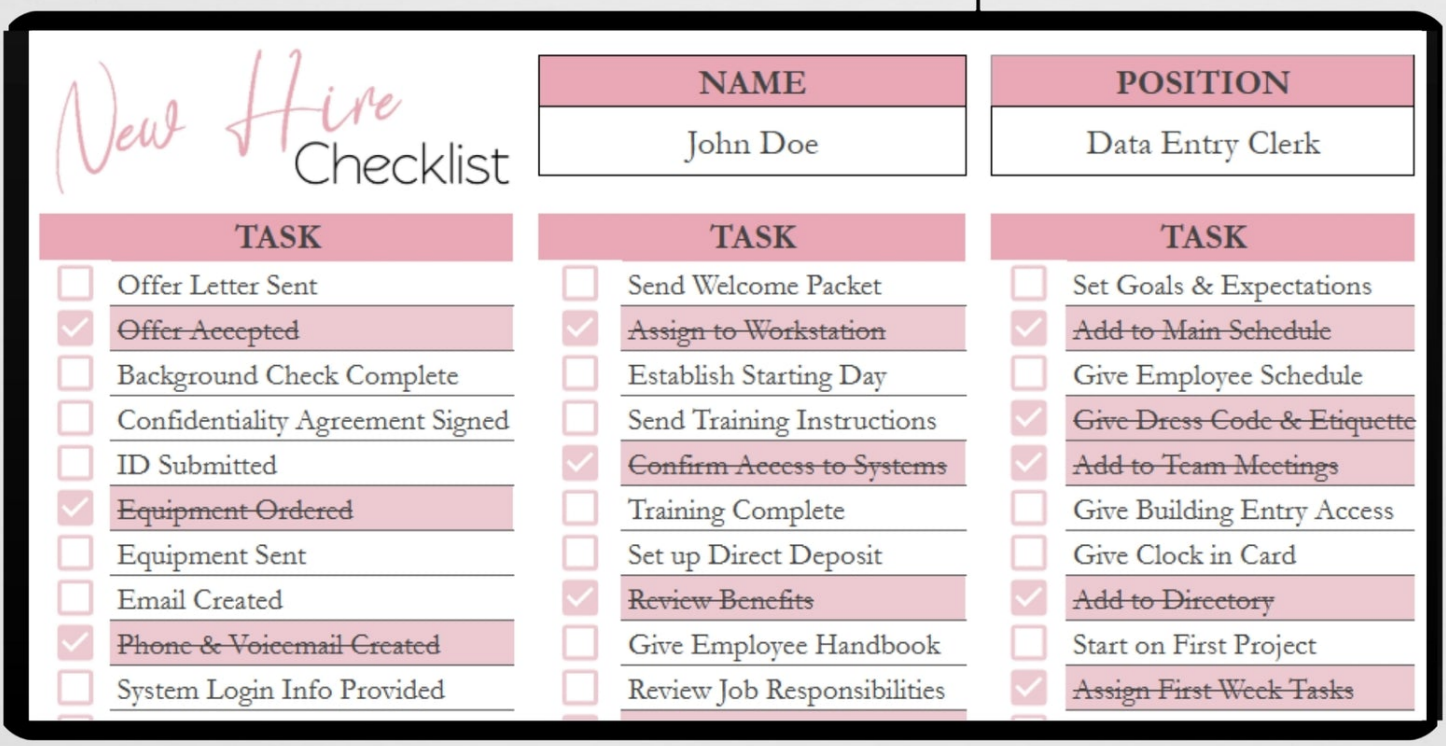
New Hire Checklist Spreadsheet



New Hire Checklist

NAME	POSITION
John Doe	Data Entry Clerk

	TASK
☐	Offer Letter Sent
☑	~~Offer Accepted~~
☐	Background Check Complete
☐	Confidentiality Agreement Signed
☐	ID Submitted
☑	~~Equipment Ordered~~
☐	Equipment Sent
☐	Email Created
☑	~~Phone & Voicemail Created~~
☐	System Login Info Provided

	TASK
☐	Send Welcome Packet
☑	~~Assign to Workstation~~
☐	Establish Starting Day
☐	Send Training Instructions
☑	~~Confirm Access to Systems~~
☐	Training Complete
☐	Set up Direct Deposit
☑	~~Review Benefits~~
☐	Give Employee Handbook
☐	Review Job Responsibilities

	TASK
☐	Set Goals & Expectations
☑	~~Add to Main Schedule~~
☐	Give Employee Schedule
☑	~~Give Dress Code & Etiquette~~
☑	~~Add to Team Meetings~~
☐	Give Building Entry Access
☐	Give Clock in Card
☑	~~Add to Directory~~
☐	Start on First Project
☑	~~Assign First Week Tasks~~

Excel Spreadsheet & Google Sheets

Easy to Use with Video Instructions