Onboarding Checklist

Track tasks & progress by phase.

Sheet	Pre set tasks rows	Onboarding Phases	Auto-highlights for dates	Auto-highlights for phases
1	100	5	3	2

Google Sheets Spreadsheet Template

Instant Download



Onboarding Checklist

New Hire Name	Jordan Ellis
Onboarding Date	Friday, May 30, 2025
Direct Supervisor	Sarah Thompson
Hiring Manager	Michael Rivera
HR Point Of Contact	Elena Petrov
Admin Point Of Contact	Daniel Cooper
Work Location	Austin, TX

Onboarding Phases	Total tasks	Done	To Do	Progress
Pre-Start date	10	7	3	70%
First day	10	6	4	60%
First week	10	8	2	80%
Second week	10	5	5	50%
First month	8	5	3	63%

Tasks	Phase	Task Responsibility: Hiring Manager	Direct Supervisor	Admin	HR	IT	New Hire	Due Date	Date Completed	Details	Notes
Send welcome email	*Pre-Start Date*	☑	☐	☑	☐	☑	☑	*20-05-25*	*21-05-25*	*Send welcome package and login credentials.*	*New hire responded positively.*
Confirm start date and time	*Pre-Start Date*	☑	☐	☑	☑	☑	☐	*27-05-25*	*28-05-25*	*Verify start date in HR system.*	*Waiting on IT confirmation.*
Share office location and directions	Pre-Start Date	☑	☑	☑	☐	☑	☑	22-05-25		Share map and parking instructions.	Parking pass emailed separately.
Create onboarding schedule	*Pre-Start Date*	☑	☐	☐	☐	☐	☐	*25-05-25*	*26-05-25*	*Add events to onboarding calendar.*	*Mentor availability confirmed.*
Set up HR system profile	Pre-Start Date	☑	☐	☑	☐	☑	☑	26-05-25		Ensure employee profile is up to date.	Task completed early.
Add new hire to communication tools	*Pre-Start Date*	☐	☐	☑	☐	☑	☐	*27-05-25*	*29-05-25*	*Add to Slack, Zoom, and internal tools.*	*Shared folder permissions granted.*
Assign onboarding buddy	*Pre-Start Date*	☐	☑	☑	☑	☑	☐	*29-05-25*	*31-05-25*	*Choose onboarding mentor from team.*	*Printed copy given as backup.*
Provide employee handbook	Pre-Start Date	☐	☑	☐	☐	☑	☐	25-05-25		Email PDF version of handbook.	Badge delay â€" rescheduled.
Ensure laptop and equipment are ready	*Pre-Start Date*	☑	☑	☑	☑	☑	☑	*27-05-25*	*29-05-25*	*Prepare laptop and accessories.*	*Lunch scheduled with team.*
Add to email distribution lists	*Pre-Start Date*	☑	☑	☐	☑	☐	☐	*23-05-25*	*25-05-25*	*Subscribe to team newsletters.*	*Pending HR system update.*
Welcome meeting with team	First Day	☑	☑	☐	☐	☐	☑	30-05-25		Host team welcome call.	Completed with supervisor.
Office tour	*First Day*	☐	☑	☑	☑	☐	☑	*30-05-25*	*31-05-25*	*Tour office, cafeteria, and exits.*	*Not needed due to remote status.*
Workstation setup and login	*First Day*	☑	☐	☑	☐	☑	☐	*30-05-25*	*01-06-25*	*Log into computer successfully.*	*Checklist shared via Teams.*
First-day HR orientation	First Day	☑	☑	☑	☐	☑	☑	30-05-25		Provide employee benefits overview.	Requires follow-up next week.
Security badge issue	*First Day*	☑	☐	☐	☐	☐	☐	*30-05-25*	*01-06-25*	*Hand over security badge.*	*Training was shortened.*
Initial team lunch	*First Day*	☐	☐	☑	☐	☑	☑	*30-05-25*	*31-05-25*	*Welcome lunch with team lead.*	*Needs revised instructions.*
Introduction to direct supervisor	First Day	☑	☑	☑	☑	☐	☐	30-05-25		Review expectations with manager.	Updated timeline shared.
Overview of job responsibilities	*First Day*	☐	☐	☐	☐	☑	☑	*30-05-25*	*30-05-25*	*Explain job tasks and deliverables.*	*Positive engagement from new hire.*
Demonstrate time tracking tool	First Day	☐	☐	☑	☑	☑	☐	30-05-25		Demo how to log hours in system.	Adjusting goals after discussion.
Complete required paperwork	*First Day*	☐	☑	☐	☐	☑	☑	*30-05-25*	*30-05-25*	*Collect required HR documents.*	*Survey link resent.*
Review company mission and values	*First Week*	☐	☑	☐	☑	☐	☑	*06-06-25*	*06-06-25*	*Explain mission with visual aids.*	*New hire responded positively.*
Set up 1-on-1s with teammates	*First Week*	☑	☑	☑	☑	☐	☐	*04-06-25*	*06-06-25*	*Short intro calls with teammates.*	*Waiting on IT confirmation.*
Basic tools and systems training	First Week	☑	☐	☐	☑	☐	☐	01-06-25		Walkthrough of tools: Notion, Asana.	Parking pass emailed separately.

GridEx

Excel Spreadsheet Template

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