

The Ultimate Onboarding Checklist for HR Teams

This easy-to-follow onboarding checklist will streamline the process, giving both new hires and HR teams a fantastic employee experience.



Your Onboarding Process Checklist

With a thorough checklist, you don't need to be afraid of missing important steps in the onboarding process. Follow these key steps, and onboarding will go as smoothly as possible!

- ❑ **Send the offer letter.** Generate a [personalized letter](#) from a template in moments using a quality software system.
- ❑ **Send a personalized video message.** Send a short welcome message to new hires after they accept your offer. Use a program like [Loom](#) to create the video in minutes. Make sure to highlight [the company culture](#) in your messaging.
- ❑ **Share a link to an [online directory](#).** Show new hires which key players they need to meet by sharing a directory with short bios and pictures.
- ❑ **Collect personal information, such as address and emergency contacts.** Ask whether new hires have any allergies, dietary preferences, or special needs.
- ❑ **Have new employees review the employee handbook.** Prompt new hires to ask any questions they may have after reading the handbook. Ask them to sign off on the document to confirm they've read it.
- ❑ **Send policy-related documents to the employee.** Share your company's confidentiality agreement and policies on time off and parental leave, as well as other key policies. Ensure employees sign off on these documents as well.



- ❑ **Send a preview of the benefits package.** Give employees an overview of health insurance benefits as well as additional options like life insurance and disability coverage. Use a quality HRMS system like GoCo's to [create this preview automatically](#), so you won't need to manually create a new one year after year.
- ❑ **Collect any necessary certificates from new hires.** If your organization is a school, get their teaching certificates on file, for example.
- ❑ **Collect withholding and payroll information from the employee.** Have the employee complete the W-4 form as well as state and local withholding forms. (GoCo offers [a free tool](#) that you can use to collect the W-4.)
- ❑ **Complete the I-9 form with the employee.** Make sure new hires complete Section 1 by the end of their first day, and complete Section 2 within three business days of their first day of work. Consider using GoCo's [free tool](#) for collecting the I-9. (If you're hiring an employee remotely, read SHRM's guidance on [how to handle the I-9](#).)
- ❑ **Ask the employee to fill out a direct deposit authorization form.** Use this form only if employees want their pay to be directly deposited, of course.
- ❑ **Prompt employees to bring the appropriate eligibility documents to work on their first day.** Ask them to bring [acceptable documents](#) such as a U.S. Passport, Permanent Resident Card, driver's license, and Social Security card, which can help establish identity and employment eligibility. Compare these documents to the information on a new hire's I-9 form to ensure they've completed it accurately.



- ❑ **Invite employees to select their benefits.** Inform them of when the benefits will become active and let them know you're available to answer any questions. **Set up an email account for the new hire and create business cards.** Send log-in instructions by email so the employee will have an active email account from the beginning of day one.
- ❑ **Set up a fully functioning workstation.** Equip the workstation with all the technology the employee needs for his or her job role. Upload all of the software that the employee needs onto the computer.
- ❑ **Send out a welcome email to all staff with whom the employee will be working.** Tell everyone who the new employee is, to ensure the new hire receives warm greetings on his or her first day.
- ❑ **Plan the orientation day.** Set up one-on-one introductions and group meet-and-greets in advance to [make the day a success](#).
- ❑ **Introduce the [training schedule](#).** Create a detailed training schedule to show new hires the support you'll provide to get them up to speed, which will make them confident and enthusiastic.
- ❑ **Set up check-ins.** Plan a shorter check-in for the end of the first week and a more formal one 30 to 60 days after the employee starts working for you.
- ❑ **Send out a quick survey about their onboarding experience.** Craft four to seven questions, to keep it short and simple. This step will help you to pinpoint areas that need improvement.

That's it! Follow these steps, and new employees will be impressed with the speed and simplicity of your onboarding process.



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