

Customizable Remote Employee Onboarding Checklist

For both on-site and remote new hires, the onboarding process should begin before the employee's start date and may extend for six months to a year, depending on the company and role.

Before first day remote onboarding tasks.

Objective: Inform coworkers of new hire and ensure worker feels welcome and has tools needed to be productive on Day 1.

- Confirm worker address. Is the worker in driving distance of a local branch office, or is there budget to bring worker to HQ for one or more days? If so, work out specifics.
- Confirm work authorization. Provide a list of forms and documents you need from the employee prior to or on the first day.
- Communicate remote work policies, including what equipment will be provided and applicable work-from-home stipends.
- Alert IT to order, configure and ship needed computers or smartphones.
- Initiate request to provision remote access and email/voice accounts.
- Complete background checks and related verifications.
- Provide employee with an HR contact and the name and contact information for the direct manager. Enter the employee in your human resources management system (HRMS).
- Present first day or first week schedule and a calendar of any standing online meetings. Prep Slack, Zoom and other collaboration tool accounts.
- Make sure all access codes and permissions are in place before employee reports for work. Decide who be online to greet the employee.
- Verify applicant is transitioned to employee status in payroll and benefit systems.
- Investigate any specific laws around PTO, nondisclosures or work schedules relevant to the worker's home state or branch office location.
- Ship company swag/welcome gifts.
- Enter your requirements here.

First-day onboarding processes.

Objective: Create positive first impression. Make introductions and ensure equipment and accounts are working and active.

- Welcome the new employee. If on site for orientation, provide any needed key cards and help employee become familiar with the facility. If online, get employee and supervisor on a video call.
- Gather all required new hire data, such as legal name, date of birth, social security number, tax filing status, tax withholding (W-9), bank info for direct-deposit paychecks, proof of citizenship status, work visas and/or other information as required by law.
- Ensure all internal new-hire paperwork, such as a nondisclosure agreement, is in good order. Address anything that is missing.
- Make introductions to direct supervisor, co-workers and others.
- Present employee with access information to employee benefits portal and company information. Provide contacts in case they have any difficulty accessing, using or understanding the information.
- Present employee with passwords and access information for all devices, software and apps, as well as additional needed codes.
- Present information on pay periods, timesheets, pay dates and any other information relevant to pay. Enroll the employee in your HCM or payroll system.
- Get employee to sign for any company assets provided and indicate condition of each.
- Answer employee's questions.
- Enter your requirements here.

First week onboarding processes.

Objective: Maintain momentum and address any problems.

- Schedule a meeting to learn how the employee is adapting. If there are logistical problems, help solve them.
- Schedule required trainings. Provide due dates so employee can prioritize.
- Go over workflows and processes to make sure employee understands and is comfortable in completing them.
- Ask if there are any questions or issues with benefits and address those.

- Introduce the employee, in an informal call to, key peers and possibly even someone who is willing to act as a mentor.
- Ask about personal interests and call out related company activities or employees with similar interests so they have an opportunity to join in.
- Enter your requirements here.

First month onboarding processes.

Objective: Ensure new employee is acclimating and meeting initial engagement, performance and training goals.

- Now that the employee has had time to experience workflows, processes and equipment, ask for feedback. Address any issues or questions, and look for clues on where training may be helpful. Listen to criticism, as outsiders may identify better ways to perform tasks.
- Check with supervisors and peers on job performance, and offer constructive feedback
- Schedule regular check-ins, and make sure the employee knows where to turn if problems arise between check-ins.
- Assess the effectiveness and availability of the employee's mentor or sponsor and offer feedback to that person as well.
- Ensure supervisor has discussed performance to date and set 60- and 90-day performance objectives aligning with company goals.
- Ensure employee is progressing with required trainings.
- Enter your requirements here.

60- to 90-day onboarding processes. Objective: Ensure new employee is acclimating and meeting initial engagement, performance and training goals.

- Continue role-based training. Suggest opportunities for additional learning, such as open-source courses or tuition reimbursement.
- Ensure supervisor is engaging regularly and setting objectives.
- Speak to employee about long-range goals and career path possibilities.
- Enter your requirements here.