

New Hire Onboarding

Remote Roles Checklist

How to use: Check each item as completed.

01

Pre-Boarding

Before Day One

- | | |
|--------------------------|--|
| ☐ | Send and collect signed offer letter or employment contract |
| ☐ | Complete background check |
| ☐ | Collect tax withholding forms (W-4) and work eligibility proof (Form I-9 Section 1) |
| ☐ | Collect direct deposit and emergency contact details |
| ☐ | Request IT set-up and create system logins/email |
| ☐ | Prepare equipment and confirm delivery before the start date |
| ☐ | Communicate to relevant departments that new hire is coming aboard |
| ☐ | Send a welcome email detailing day-one logistics (computer login instructions, schedule, etc.) |
| ☐ | Assign an onboarding mentor or buddy |

02

Day One Orientation

First Day

- | | |
|--------------------------|---|
| ☐ | Schedule a virtual introductory session to welcome the new hire |
| ☐ | Provide a company overview (mission, culture, values) |
| ☐ | Provide a benefit orientation |
| ☐ | Discuss the employee handbook and all operational policies |
| ☐ | Complete remaining compliance paperwork (Form I-9 Section 2) |
| ☐ | Set up virtual meet-and-greets between the new hire and their manager, team, and assigned buddy |

03

First Week

Days 2–5

	Verify access to communication channels (Teams, email, project boards, etc.)
	Schedule recurring virtual 1:1 check-in with their direct manager
	Begin role-specific and technical tool training
	Attend cross-functional virtual introductory meetings with key collaborators

04

First 30–90 Days

Ramp-Up & Review

	Complete mandatory compliance and safety training
	Set and evaluate short-term goals for the initial 30-day checkpoint
	Transition into independent day-to-day project workflows
	Conduct a formal 90-day progress review and feedback session

Company customization: Add your logo and brand colors when deploying this checklist.