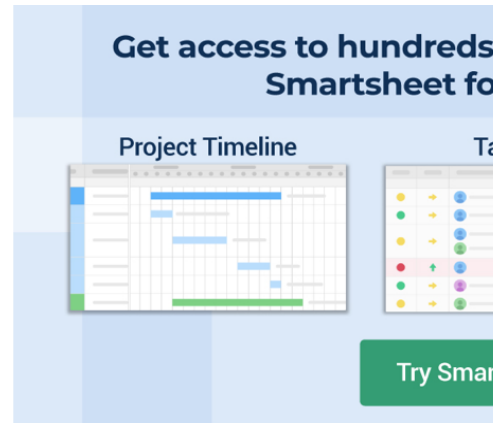




Thank you for downloading this Excel template.

We hope you find it useful. Excel can be a good tool for basic spreadsheets, but it lacks real-time visibility and collaboration capabilities.

Smartsheet can help you better plan, track, manage, and automate your projects and workflows.



ONBOARDING CHECKLIST FOR MANAGE

CHECKLIST CATEGORY	NEED
PRIOR TO START	
SCHEDULE AND DUTIES	
Call to confirm start date, time, location, and contact person	
Convey transportation / parking info	
Review dress code	
Email link to company / department onboarding webpage	
Discuss relocation	
FIRST DAY ACTION PLAN / WELCOME PACKET	
Job description	
New employee documentation / checklist	
Time-Off policies: vacation, sick leave, reporting guidelines, etc.	
Job manual	
Employee handbook	
Week-One schedule	
Department organization chart and contact info	
Building / campus map	
Mission statement	
Payroll structure / direct deposit	

Confidentiality Info and documentation	
CONNECTION BUILDING	
Colleague notification: new hire start date, role, bio, etc.	
Designate coworker to serve as a resource for new hire	
Plan tour(s)	
Arrange necessary meetings	
HUMAN RESOURCES	
Identify HR point of contact for new hire	
Confirm receipt of all recruitment paperwork	
Confirm offer letter receipt / acceptance	
Confirm background check completion	
WORK STATION / AREA	
Secure / designate space	
Furniture	
Supplies	
Phone install and number assignment	
Cleaning	
Business cards, name plate, etc.	
TECHNOLOGY / ACCESS	
Passkey order form	
Set up temporary access for contract new hires	
Software acquisition	
Printdriver setup	
Mobile device, if applicable	
TRAINING / DEVELOPMENT	
Enroll in new hire HR briefing webinar, meeting, etc.	
Schedule any pertinent training sessions	
DAY ONE	

DEPARTMENT ONBOARDING	
Welcome upon arrival and guide to work station / office	
Deliver and review prepared welcome packet	
Discuss break / meal policies	
Discuss contract / trial period, if applicable	
Introduce to designated coworker resource	
Confirm receipt and functionality of passkeys	
HUMAN RESOURCES ONBOARDING	
Connect with HR to complete any further paperwork	
Review portal	
Sign offer letter, if necessary	
Confirm enrollment in any benefits / services	
APPROPRIATE TOURS	
Review software, hardware, technology, printers, etc.	
Confirm email setup	
Confirm phone setup	
Review technology acceptable use policies	
Assist with online directory setup, if applicable	
FURTHER INTRODUCTIONS / TASKS	
FIRST WEEK	
CHECK-IN / REVIEW	
Ask how first week went, assist with any questions	
Review training schedule	
Review all technology functionality	
Discuss company culture and work style	
Discuss current projects and cyclical programs	
Review company mission statement, vision, and policies	
ADDITIONAL FIRST WEEK TASKS	

FIRST MONTH	
CHECK-IN / REVIEW	
Assess need for weekly or bi-weekly meetings	
Answer any questions	
Set short and long-term goals	
Discuss performance review process and performance standards	
Meet with designated department resource to discuss their perspective	
ADDITIONAL FIRST MONTH TASKS	
FIRST THREE MONTHS	
CHECK-IN / REVIEW	
Performance review	
Review short and long-term goals	
Answer any questions	
ADDITIONAL FIRST THREE MONTHS TASKS	
FIRST SIX MONTHS	
CHECK-IN / REVIEW	
Performance review	
Review short and long-term goals	
Answer any questions	
ADDITIONAL FIRST SIX MONTHS TASKS	
FIRST YEAR	
CHECK-IN / REVIEW	

Performance review	
Review short and long-term goals	
Answer any questions	
ADDITIONAL FIRST YEAR TASKS	
TRIAL PERIOD END (IF APPLICABLE)	
CHECK-IN / REVIEW	
Celebrate end of trail period status	
Schedule annual performance review	
Answer any questions	
Reassess goals	
ADDITIONAL TRIAL PERIOD END TASKS	

[CLICK HERE TO CREATE](#)

STATUS DROPDOWN KEY
COMPLETE
IN PROGRESS
HOLD
ALERT
N/A

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