Employee onboarding checklist

36 tasks from signed offer to day 90. Tick each task and write who did it.

PAYRUN

New hire | Role | Start date | Manager | Buddy

BEFORE DAY ONE

12 tasks · Finish by the working day before the start date

	#	TASK	OWNER	WHEN	DONE BY
☐	1	Get the offer letter signed	Manager	Before anything else	
☐	2	Confirm start date, hours, salary, place of work and manager	HR or ops	Offer signed	
☐	3	UK: check the right to work. US: send Form I-9 instructions	HR or ops	UK: before employment starts	
☐	4	Prepare the contract (UK: principal written statement for day one)	HR or ops	Before day one	
☐	5	Collect address, emergency contact, bank and tax details	HR or ops	Before day one	
☐	6	Create the employee record: department, job title, status, start date	HR or ops	Before day one	
☐	7	Order laptop and equipment; log serial numbers and handover date	IT or admin	1 to 2 weeks before	
☐	8	Create email and tool accounts with role-based access	IT or admin	2 working days before	
☐	9	Pick a buddy who isn't the manager	Manager	1 week before	
☐	10	Plan the first-week schedule	Manager	3 working days before	
☐	11	Send the welcome email: where, when, who, what to bring	Manager	3 working days before	
☐	12	Tell the team who's joining and when	Manager	1 week before	

DAY ONE

8 tasks · Keep the day light: people, logins, one small task

	#	TASK	OWNER	WHEN	DONE BY
☐	13	Welcome, tour (or video call) and team introductions	Manager	Morning	
☐	14	Hand over equipment and test every login	IT or admin	Before lunch	
☐	15	US: employee completes Form I-9 Section 1. UK: give the principal written statement	HR or ops	Day one	
☐	16	Walk through the handbook: hours, leave, expenses, remote work, conduct	HR or ops	Day one	
☐	17	Explain pay dates, timesheets and how to request leave	HR or ops	Day one	
☐	18	Buddy lunch or call	Buddy	Day one	
☐	19	Set a first small task they can finish today	Manager	Day one	
☐	20	10-minute end-of-day check-in	Manager	End of day	

FIRST WEEK

8 tasks · Close the paperwork and agree goals

	#	TASK	OWNER	WHEN	DONE BY
☐	21	US: employer completes Form I-9 Section 2	HR or ops	Within 3 business days of hire	
☐	22	US: collect Form W-4 and report the new hire to the state	HR or ops	W-4 before first payroll; report within 20 days	
☐	23	UK: register with HMRC (FPS) using the P45 or starter checklist; check pension eligibility	HR or ops	On or before first pay day	
☐	24	Set up payroll: salary, allowances and start date	HR or ops	Before the first pay run	
☐	25	Role training and tool walkthroughs	Manager	Days 2 to 3	
☐	26	Daily buddy check-ins	Buddy	Every day	
☐	27	First real piece of work	New hire	Day 4	
☐	28	Week-one review and agreed 30-60-90 goals	Manager	Day 5	

FIRST 90 DAYS

8 tasks · Learn, contribute, own

	#	TASK	OWNER	WHEN	DONE BY
☐	29	Day 30 check-in against goals	Manager	Day 30	
☐	30	Ask for onboarding feedback: what was missing?	HR or ops	Day 30	
☐	31	UK: give the wider written statement	HR or ops	Within 2 months	
☐	32	Day 60 check-in: where is less or more help needed?	Manager	Day 60	
☐	33	Confirm every document is filed on the employee record	HR or ops	Day 60	
☐	34	Day 90 review (and probation decision, if you use one)	Manager	Day 90	
☐	35	Set next-quarter goals or a development plan	Manager	Day 90	
☐	36	Update this checklist with the feedback	HR or ops	Day 90	

Legal items summarise US (USCIS, IRS, ACF) and UK (GOV.UK, HMRC) guidance checked on 15 November 2026. This is a summary, not legal advice. Check the current rules for your state or country. Full guide: payrun.app/blog/employee-onboarding-checklist · Payrun HR software, payrun.app