

Onboarding Checklist

Onboarding Checklist

Work through each item in order and mark it as completed. Add a note against anything you could not complete, and sign the form when you finish.

Employee name: _____

Job title: _____

Department: _____

Date completed: _____ dd / mm / yyyy

BEFORE YOU START

- ☐ Confirm identity and check the record is the correct one
- ☐ Confirm consent is in place and still valid
- ☐ Check for allergies, contraindications and recent changes
- ☐ Gather the equipment and paperwork you need

ONBOARDING - MAIN STEPS

- ☐ Check role, dates and responsible manager
- ☐ Record objectives, evidence and ratings
- ☐ Review agreed actions and support needs
- ☐ Confirm nothing has been missed

BEFORE YOU FINISH

- ☐ Complete the record while the detail is fresh
- ☐ Agree review dates and sign-off
- ☐ Give written information and contact details
- ☐ Book or confirm the next appointment

ANYTHING NOT COMPLETED

Item: _____

Reason: _____

Action needed: _____

By when: _____

Item: _____

Reason: _____

Action needed: _____

By when: _____

Item: _____

Reason: _____

Action needed: _____

By when: _____

Item: _____

Reason: _____

Action needed: _____

By when: _____

NOTES

Notes

Signature and date
Checked by: _____