New Hire Ready

A practical onboarding readiness checklist for small businesses

A signed offer is not the finish line—it is the handoff into onboarding. Use this checklist to prepare the employee, manager, paperwork, workplace, and first 30 days before your new hire arrives.

How to use: Mark each item *Ready* or *Needs work*. Assign an owner to anything that needs work before the start date.

1 Before Day One

	READY	NEEDS WORK
The written offer or employment communication reflects the agreed position, start date, pay, schedule, work location, and other applicable terms.	☐	☐
The hiring manager and key team members know the employee's start date and responsibilities.	☐	☐
Workspace, equipment, system access, email, keys/badges, and required tools are requested or ready.	☐	☐
The new hire knows when and where to report, who to ask for, what to bring, and what to expect on the first day.	☐	☐

2 Paperwork & Records

	READY	NEEDS WORK
We have a consistent new-hire paperwork process and know which documents are required for this employee.	☐	☐
We are prepared to complete Form I-9 requirements within the applicable federal timelines.	☐	☐
Tax withholding, direct deposit or payment information, emergency contact information, and other applicable forms are ready.	☐	☐
Personnel, medical/confidential, and payroll-related records will be stored appropriately with access limited as needed.	☐	☐

3 Policies & Expectations

	READY	NEEDS WORK
The employee will receive applicable workplace policies, handbook information, and required notices.	☐	☐
We have a process to document employee acknowledgment of important policies.	☐	☐
Attendance, scheduling, timekeeping, overtime approval, call-in procedures, dress/safety expectations, and conduct standards will be explained as applicable.	☐	☐
The employee knows where to take HR, payroll, benefits, leave, safety, or workplace concerns.	☐	☐

4 Role & Training

	READY	NEEDS WORK
The manager has a clear plan for the employee's first day and first week.	☐	☐
Job duties, performance expectations, priorities, and reporting relationships will be explained.	☐	☐
Required job, safety, systems, policy, and compliance training has been identified.	☐	☐
A specific person is responsible for each part of the new hire's training rather than assuming someone will handle it.	☐	☐

5 First 30 Days

	READY	NEEDS WORK
Manager check-ins are scheduled during the first week and throughout the first 30 days.	☐	☐
The employee will have opportunities to ask questions and clarify expectations.	☐	☐
We have defined what early success should look like by approximately 30 days.	☐	☐
Any missing access, training, paperwork, pay, scheduling, or employee-support issue will be documented and followed through to resolution.	☐	☐

Your 30-Day Onboarding Path

Give the employee a path—not just a start date.

WHEN	FOCUS	WHAT TO COVER
Day 1	**Welcome & orient**	Introductions · paperwork · policies · workplace tour · role overview · systems/access · immediate questions
Week 1	**Learn & connect**	Core training · job priorities · team relationships · manager check-in · confirm time/pay processes
Weeks 2–3	**Practice & coach**	Hands-on work · feedback · additional training · remove barriers · clarify expectations
Day 30	**Review & reset**	Discuss progress · questions · early wins · gaps · support needed · next 30-day priorities

Tip: For a step-by-step manager checklist covering each stage, use the companion resource *The First 30 Days*.

New Hire Information Snapshot

Employee name _____

Position / department _____

Manager _____

Start date / reporting time _____

Work location _____

Pay / payroll update confirmed _____

Equipment / system access owner _____

Primary trainer / onboarding buddy _____

30-Day Manager Check-In

What is going well?

What remains unclear?

What training or support is still needed?

What are the priorities for the next 30 days?

Want a smoother new-hire experience?

ThriveWell HR Consulting, LLC helps small businesses organize onboarding workflows, new-hire documentation, manager readiness, employee support, and payroll-change coordination.

Have a question? Visit **Ask ThriveWell** at thrivewellhrconsultingllc.com

Educational resource only. This checklist is not legal, tax, benefits, or payroll-processing advice and does not determine compliance. Onboarding, employment, wage-and-hour, recordkeeping, notice, and other requirements vary by employer and location. Consult qualified legal or other professional counsel when appropriate.