

JZ Payroll Outsourcing & Contract Staffing

15+ Years of Excellence in HR Solutions | Pan India Services



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Employee Onboarding Checklist 2025

Complete Guide for Seamless Employee Integration

Onboarding Progress



0% Complete (0 of 0 items)



PHASE 1: PRE-BOARDING

Offer Acceptance to Day -1

Document Collection & Verification

☐ **Send welcome email with joining details**

Include start date, time, location, contact person, and what to bring

☐ **Collect identity documents**

Aadhaar Card, PAN Card, Passport (for expats), Voter ID

☐ **Obtain address proof**

Utility bill, rental agreement, bank statement (within 3 months)

☐ **Verify educational documents**

Degrees, certifications, mark sheets, professional qualifications

☐ **Review employment history**

Relieving letters, experience certificates, salary slips (last 3 months)

☐ **Obtain medical certificates (if required)**

Health check-up reports, fitness certificates for specific roles

Pre-arrival Setup

☐ **Prepare workspace and desk setup**

Assign seating, prepare welcome kit, office supplies

☐ **Create IT accounts and access**

Email ID, system login, software licenses, VPN access

☐ **Assign mentor/buddy**

Designate experienced team member for guidance and support

☐ **Schedule first-day meetings**

HR orientation, team introductions, manager meeting



PHASE 2: DAY 1 - FIRST DAY

Joining Day Activities

Welcome & Orientation (Morning)



Warm welcome at reception

Greet employee, offer refreshments, introduce to reception team



Office tour and facilities introduction

Show workstations, meeting rooms, cafeteria, washrooms, emergency exits



Complete documentation formalities

Employment contract, policy acknowledgments, tax forms



Take employee photographs

For ID card, employee database, company records

Statutory & Compliance (Mid-Morning)



PF (Provident Fund) enrollment

Form 11, UAN generation, nominee details



ESI (Employee State Insurance) registration

Medical coverage enrollment, card issuance process



Professional Tax registration

State-specific professional tax enrollment



Bank account verification for salary

Account details, IFSC code, cancelled cheque



Tax declaration (Form 12B)

Investment declarations for tax planning

IT Setup & Access (Late Morning)

☐ **Provide laptop/desktop and peripherals**

System configuration, accessories, IT asset agreement

☐ **Setup email account and communication tools**

Email configuration, Slack/Teams access, phone extension

☐ **Provide access to required software/systems**

CRM, HRMS, project management tools, specialized software

☐ **Issue ID card and access cards**

Employee ID, building access, parking pass if applicable

Team Integration (Afternoon)

☐ **Introduce to immediate team**

Team meeting, individual introductions, role explanations

☐ **Arrange welcome lunch with team**

Informal interaction, team bonding, culture introduction

☐ **Connect with assigned mentor/buddy**

First meeting, exchange contacts, schedule regular check-ins

☐ **Meeting with direct manager**

Role discussion, expectations, initial goals setting

☐ **Collect feedback on first day experience**

Quick survey, verbal feedback, areas for improvement



PHASE 3: FIRST WEEK

Days 2-7

Training & Development

☐ **Conduct company culture workshop**
Values, mission, vision, history, organizational structure

☐ **Provide role-specific training**
Job responsibilities, processes, tools, performance standards

☐ **Schedule meetings with key stakeholders**
Cross-department introductions, collaboration partners

☐ **Set 30-60-90 day goals**
SMART objectives, milestones, success metrics

Policy & Compliance Training

☐ **HR policies and procedures training**
Leave policy, attendance, performance management, grievance handling

☐ **Information security and data privacy training**
DPDP Act compliance, password policies, data handling protocols

☐ **Workplace safety and POSH training**
Sexual harassment prevention, safety protocols, emergency procedures

☐ **Code of conduct and ethics training**
Professional behavior, conflict of interest, compliance requirements



PHASE 4: EXTENDED INTEGRATION

Months 1-3

Performance Monitoring

☐ **30-day check-in meeting**
Progress review, challenges discussion, support needs assessment

**60-day performance evaluation***Goal achievement assessment, skill development review***90-day comprehensive review***Performance evaluation, probation decision, future planning***Conduct pulse surveys***Weekly feedback collection, satisfaction measurement*

Continuous Support

**Provide ongoing coaching and mentorship***Regular mentor meetings, skill development guidance*