Onboarding Checklist

*This checklist outlines the general items that apply to every employee*

*as well as possible team-specific apps.*

# **Salary/Wages/Mandatory agreements**

*Use this section to outline what every employee needs to sign/submit and indicate the portal/database [ex: ADP] in which that needs to happen. Examples are below.*

[ ]  Documents

[ ]  W4

[ ]  Direct Deposit

[ ]  I-9 & E-Verify

[ ]  Non-Compete/PIIA

[ ]  ISO Grant/Agreement

[ ]  Information Security Policy

[ ]  Workplace Guide

[ ]  Insurance Enrollment/Waiver

[ ]  Additional Benefits Enrollment/Waiver

# **Equipment/Facilities**

*Use this section to outline what every employee will be provided. Examples are below.*

[ ]  Desk and Chair

[ ]  Laptop

[ ]  Monitor/Keyboard/Mouse/Laptop Stand

[ ]  Building keys/access cards & office suite keys

[ ]  Headset (if applicable)

[ ]

[ ]

# **Internal Applications**

*Use this section to outline what every employee will be provided, and who can grant access. Examples are below.*

[ ]  Application - [Department & Contact Person]

[ ]  Gmail, calendar, and drive – [Department & Contact Person]

[ ]  Zoom - [Department & Contact Person]

[ ]  Expensify (Expense Reports/Reimbursements) - [Department & Contact Person]

[ ]  Slack (Internal Communication & Collaboration) - [Department & Contact Person]

[ ]  Asana - [Department & Contact Person]

# **Sales Team Apps**

[ ]  Salesforce - [Department & Contact Person]

[ ]  LinkedIn Sales Navigator - [Department & Contact Person]

[ ]  Calendly - [Department & Contact Person]

[ ]

# **Customer Service Team Apps**

[ ]  Zendesk - [Department & Contact Person]

[ ]  Intercom - [Department & Contact Person]

[ ]  Calendly - [Department & Contact Person]

[ ]

# **Marketing team apps**

[ ]  HubSpot - [Department & Contact Person]

[ ]  Adobe Creative Cloud - [Department & Contact Person]

[ ]

[ ]