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]