

New Hire Checklist

A setup checklist covering the forms, accounts, equipment, and access a new employee needs to start work.

Complete New Hire Paperwork

- Collect the signed offer letter and employment agreement
- Gather tax and payroll forms required for your region
Requirements vary by location; follow local laws and confirm with HR.
- Set up direct deposit with verified bank details
- Record emergency contact and personal information
- Have the new hire sign policy and handbook acknowledgments
- File all completed documents in the employee record securely

Create System Accounts

- Create the company email account and mailbox
- Set up a network or single sign-on login
- Add the new hire to relevant team distribution lists
- Provision accounts in core software and the HR system
- Set a temporary password and require a reset at first login
Enforce multi-factor authentication from the start.
- Add the employee to the company directory and org chart

Prepare Equipment

- Order a laptop or desktop sized to the role's needs
- Install and update required software and security tools
- Provide a monitor, keyboard, mouse, and headset as needed
- Issue a phone or SIM if the role requires one
- Label and log all assigned equipment by serial number
An asset log makes future returns simple.
- Test that all hardware powers on and connects before day one

Grant Access and Credentials

- Assign role-based permissions to shared drives and folders
- Grant access to project tools, dashboards, and databases
- Issue building badges, keys, or door access codes
- Set up parking, elevator, or facility access if needed
- Add the new hire to required security and VPN groups
- Document granted access for future audits and offboarding
Track access so it can be revoked cleanly later.

Set Up the Workspace

- Assign a desk, office, or remote workspace stipend
- Stock basic supplies like notebooks, pens, and chargers
- Set up the chair, monitor, and ergonomics for comfort
- Place a welcome note or starter kit at the desk
- Confirm the workspace connects to network and printers

- Provide a quick reference card for logins and IT support

Confirm First-Day Readiness

- Verify all accounts, passwords, and access actually work
- Run a test login on the new hire's primary device
- Confirm payroll and benefits enrollment is in progress
- Share the IT help desk contact and support hours
- Notify HR, IT, and the manager that setup is complete
- Do a final walkthrough of the desk and equipment

A quick check prevents day-one surprises.