

Employee onboarding checklist

This sample separates access, learning and readiness. The manager owns the checklist; IT owns access provisioning; the procedure owner answers process questions. Completion of reading is not the same as demonstrated readiness.

Document control

Example version 1.0. Confirm the owner, reviewer and effective date before use.

Owner _____ Reviewer _____
Effective date _____ Next review _____

Steps and evidence

Before the first practice task

Responsible role: Manager and IT

Completion evidence: Named manager, role-appropriate access approved and tested; current handoff SOP assigned.

Guided practice

Responsible role: Learner and trainer

Completion evidence: Use Demo Account 104. Verify contact and scope, assign the receiving owner, and record a next action.

Exception practice

Responsible role: Learner

Completion evidence: Recognize a missing contact, pause the handoff and route the question to the procedure owner.

Readiness review

Responsible role: Manager

Completion evidence: Inspect the fictional handoff record, discuss unresolved questions and record the decision and any additional practice.

Checks and exceptions

- Keep passwords and private employee information out of the checklist and screenshots.
- If a procedure changes, the owner decides whether the learner needs a new assignment or a short explanation. Preserve the earlier training record.
- Choose your review dates and readiness criteria before assigning the checklist; the example is not a universal onboarding schedule.

Before practice, identify the SOP version and approved access. If a prerequisite is missing, pause practice and tell the manager.

Record to complete

Task reference: _____

Procedure and version: _____

Person performing the task: _____

Receiving owner or reviewer: _____

Result and next action: _____

Due date: _____

Exception and resolution: _____

Review decision: _____

Change history

Date _____ Version _____ Change and reason _____

Reviewer _____ Training impact _____

Illustrative example with fictional data. Adapt and test the procedure with its owner before approving it.