

# Employee Onboarding Checklist Template for TMS

This checklist ensures that HR teams effectively plan and manage each stage of onboarding using their chosen TMS. It includes key tasks, responsible parties, timelines, and progress tracking.

## 1. Pre-boarding (Before Start Date)

| Task                               | Assigned To    | Due Date     | Completed (✓)            |
|------------------------------------|----------------|--------------|--------------------------|
| Send offer letter and paperwork    | HR             | [MM/DD/YYYY] | <input type="checkbox"/> |
| Add employee to TMS                | HR             | [MM/DD/YYYY] | <input type="checkbox"/> |
| Set up employee email and accounts | IT             | [MM/DD/YYYY] | <input type="checkbox"/> |
| Schedule orientation session       | HR/Admin       | [MM/DD/YYYY] | <input type="checkbox"/> |
| Prepare welcome package            | Office Manager | [MM/DD/YYYY] | <input type="checkbox"/> |

## 2. First Day Tasks

| Task                                  | Assigned To | Completed (✓)            |
|---------------------------------------|-------------|--------------------------|
| Greet and introduce to team           | Manager     | <input type="checkbox"/> |
| Provide TMS login credentials         | HR          | <input type="checkbox"/> |
| Complete digital onboarding forms     | Employee    | <input type="checkbox"/> |
| Review employee handbook and policies | Employee    | <input type="checkbox"/> |
| Give tour of systems and tools        | Team Lead   | <input type="checkbox"/> |

### 3. First Week Tasks

| Task                                  | Assigned To      | Completed (✓)            |
|---------------------------------------|------------------|--------------------------|
| Assign onboarding mentor/buddy        | HR/Manager       | <input type="checkbox"/> |
| Begin mandatory training modules      | Employee         | <input type="checkbox"/> |
| Schedule 1:1 with manager             | Manager          | <input type="checkbox"/> |
| Set short-term goals in TMS           | Manager/Employee | <input type="checkbox"/> |
| Gather initial feedback on onboarding | HR               | <input type="checkbox"/> |

### 4. First 30–90 Days

| Task                                 | Assigned To | Completed (✓)            |
|--------------------------------------|-------------|--------------------------|
| Track performance milestones in TMS  | Manager     | <input type="checkbox"/> |
| Conduct 30/60/90-day check-ins       | Manager     | <input type="checkbox"/> |
| Assign development or learning paths | HR/Manager  | <input type="checkbox"/> |
| Collect onboarding feedback survey   | Employee/HR | <input type="checkbox"/> |
| Finalize onboarding process review   | HR          | <input type="checkbox"/> |