

Manager's New Employee Integration Checklist

Use this printable checklist to guide and track the integration of your new team member. Write in the completion dates and notes for each task.

Employee Details

Employee Name:

Job Title:

Department:

Start Date:

Manager Name:

Peer Buddy:

Phase 1: Pre-Boarding (Before Day 1)

Task Description	Date Completed	Notes / Details
Confirm IT hardware (laptop, monitor, phone) is ordered and ready.	<input type="text"/>	<input type="text"/>
Set up email, Slack, and necessary software accounts.	<input type="text"/>	<input type="text"/>
Prepare the physical desk or ship remote work equipment.	<input type="text"/>	<input type="text"/>
Assign a Peer Buddy and brief them on their role.	<input type="text"/>	<input type="text"/>
Send welcome email with Day 1 schedule and arrival details.	<input type="text"/>	<input type="text"/>

Phase 2: First Day

Task Description	Date Completed	Notes / Details
Welcome employee and introduce them to the immediate team.	<input type="text"/>	<input type="text"/>
Office tour (or virtual walkthrough) and facilities orientation.	<input type="text"/>	<input type="text"/>
Assist with initial login, password setup, and HR paperwork.	<input type="text"/>	<input type="text"/>
Conduct team lunch (virtual or in-person).	<input type="text"/>	<input type="text"/>
End-of-day check-in to answer immediate questions.	<input type="text"/>	<input type="text"/>

Phase 3: First Week

Task Description	Date Completed	Notes / Details
Review job description, key responsibilities, and performance goals.	<input type="text"/>	<input type="text"/>
Schedule recurring 1-on-1 meetings.	<input type="text"/>	<input type="text"/>
Assign initial training modules and reading materials.	<input type="text"/>	<input type="text"/>
Introduce to cross-functional stakeholders and key contacts.	<input type="text"/>	<input type="text"/>
Assign first minor, low-stakes project or task.	<input type="text"/>	<input type="text"/>

Phase 4: First Month

Task Description	Date Completed	Notes / Details
Conduct 30-day informal performance and integration review.	<input type="text"/>	<input type="text"/>
Verify completion of all mandatory compliance and HR training.	<input type="text"/>	<input type="text"/>
Gather feedback on the onboarding and integration process.	<input type="text"/>	<input type="text"/>
Define short-term performance goals for the next 60 days.	<input type="text"/>	<input type="text"/>

Manager Sign-Off

I confirm that the integration steps detailed above have been completed.

Manager Signature: Date: