Onboarding your remote workers: Checklist template

This template is designed to give you a foundation for a remote worker onboarding checklist. This is a point of reference for your own internal onboarding program, to help you complete the essential steps that will get your new employee onboard and productive as quickly as possible.

This 6-step framework works alongside our [Onboarding Checklist for Remote Workers blog](https://www.interact-intranet.com/onboarding-checklist-for-remote-employees), covering the key stages of joining an organization:

* During recruitment
* On acceptance of an offer
* Before starting
* The first day
* The first few weeks

Rolled out successfully, an onboarding program will not only decrease time to productivity but delivers a measurable impact on employee engagement and commitment to your organization: a key challenge for remote workers who may face a feeling of disconnect from your company culture. This improves their experience of work, reducing levels of isolation or work-related stress and ultimately, improving staff retention rates.

*Employees are 58 percent more likely to be at their company three years later if they complete a structured onboarding process.*

**Using this remote worker onboarding checklist**

1. If you haven’t already, take a read of our [Onboarding Checklist for Remote Employees blog](https://www.interact-intranet.com/onboarding-checklist-for-remote-employees)
2. Go through the checklist and add, edit or delete the appropriate points to match the culture and needs of your own organization
3. Discard this introduction page.
4. Use this checklist as a point of reference each time you onboard a new remote-based worker, to ensure all the vital steps are completed

*Looking for more ideas, tips or inspiration for improving the employee experience of your organization? Check out the* [*Interact blog*](https://www.interact-intranet.com/blog/) *for insights and thought leadership pieces that will help set your employer brand apart from the rest.*

Version [0.0]

[Date]

completed by: [YOUR NAME]

[company name]

[Company address]



Remote Employee Onboarding Checklist

[Employee name]

# Remote Employee Onboarding Checklist

## employee details:

| Employee Name: |  |
| --- | --- |
| Job title: |  |
| Department: |  |
| Employee Manager: |  |
| Start Date: |  |
| Probation period: |  |

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## Recruitment stage

Update role description and responsibilities

Online / website careers information current and update

Interviewee given details around role expectations and accountability

## on acceptance of offer

*[This stage covers the immediate period following an offer of employment.]*

Verbal offer

Formal written offering

Agree starting date

Issue job contract, copies for employer and employee

Send copy of full job description and role responsibilities

Request for new starter information:

Contact information

Social security

Payroll details

Tax and Eligibility to Work forms (e.g., W-4 and/or I-9 forms)

Reference requests

Business / role specific agreements: [examples]

Confidentiality Agreement

Non-disclosure Agreement

## before starting date: PRE-BOARDING

*[Ensure a seamless first week for both employer and employee and secure engagement from your new-starter with a comprehensive pre-boarding process.]*

Send Welcome Email to new employee, including:

Onboarding itinerary

Key contact details

Employee handbook

Login details for company intranet – new starter homepage

FAQs document

Send ‘Welcome to the team’ goodie bag

Order employee equipment for delivery at time to suit employee:

Laptop / PC

Cellphone

Tablet / mobile device

Printer

Screen

Set up employee accounts for IT systems and applications:

Company email

CRM

Cloud storage account

Office 365

HR system

Payroll system

Role-specific applications: consult with manager / supervisor

Address individual requirements of remote employee:

WiFi / connectivity requirements

Workspace / workstation needs (shared office space? Equipment needs)

Applications / tools for managing workload, accountability, time management

Book and add induction sessions to employee calendars

Send ‘Your first day’ email a day or two before, including:

Instructions for setting up laptop/PC

Requested hours of work and itinerary

Login details for email / initial key systems

## FIRST DAY

*[The below is not exhaustive, and may be expanded to include several of the ‘first week’ activities. This is dependent on the individual employee and organization.]*

Initial welcome and office tour

Set up of essential systems, accounts and communication tools with IT

Introduce to the team, including any direct reports

Provide and talk through company organization chart

Introduce to dedicated sponsor or mentor

One-to-one meeting with manager or supervisor

## first week(s)

*[This section looks beyond initial orientation of the employee to the process of fully onboarding and immersing them with other areas of the organization.]*

Book induction sessions with key departments:

Management: company overview

HR

Finance

IT

Product / services representative

Sales

Marketing

Set out success metrics, deliverables and key projects for first few months

Check and cater for any training requirements

Book check-in meetings with line manager /supervisor

Book in HR check-in meeting to follow up on induction period

Send onboarding evaluation

Book probation review meeting

## follow up and review

*[Ensure you continually evolve and improve your onboarding process by learning from the feedback and experiences of employees.]*

HR induction review meeting conducted

Onboarding evaluation received and any points raised addressed

Probation review meeting conducted

Contract, benefits and permissions adjusted on completion of probation period