



**Template for core tasks to undertake when welcoming new employees at a distance**

**Onboarding checklist for remote employees**

**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

**Onboarding checklist for remote employees**

**Version [0.0]**

**[Date]**

**completed by: [YOUR NAME]**

**[company name]**

**[Company address]**

**Remote employee checklist**

| 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: preboarding**

*[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 and access to preboarding intranet area

 [ ]  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 virtual 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

[ ]  Company overview including history, values, mission, leadership

[ ]  Introduce to dedicated sponsor or mentor

[ ]  One-to-one meeting with manager or supervisor

[ ]  Introduction to intranet including essential company/HR resources and information

**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

[ ]  Training on core business processes: e.g., booking leave, submitting expenses, raising POs

[ ]  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

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