

JUSTWORKS.

# Virtual Onboarding Checklist

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Onboarding a new remote employee doesn't have to be overwhelming. Stay organized and on-track with this virtual onboarding checklist.

## THE TAKEAWAYS:

1. Pre-onboarding communication/welcome kit checklist
2. Step-by-step initial onboarding/new-hire set-up checklist
3. Detailed in-department onboarding checklist



Printable checklist pages 3-6

## VIRTUAL ONBOARDING CHECKLIST

_____ EMPLOYEE NAME	_____ POSITION
_____ DEPARTMENT	_____ MANAGER
_____ OFFER ACCEPTED DATE	_____ SCHEDULED START DATE
_____ ONBOARDING DATE	_____ ONBOARDING TIME

### Pre-Onboarding

- Send an offer letter
- Proprietary information and inventions assignment agreement (PIIA) (if appropriate)

 *Once the signed conditional offer letter is received:*

- Background check disclosures
- Schedule a start date

### Welcome Email

 *Send a welcome email as soon as the new hire has been scheduled for onboarding.*

- Onboarding schedule (date and time)
- Equipment requirements
- List of documents/information required for initial onboarding
- Getting to know you survey
- Company overview



## Welcome Kit



*Ship a welcome kit to the new hire's home, ideally for arrival prior to the onboarding session.*

\_\_\_\_\_  
LOGO ITEM

\_\_\_\_\_  
ADDITIONAL ITEM

\_\_\_\_\_  
LOGO ITEM

\_\_\_\_\_  
ADDITIONAL ITEM

\_\_\_\_\_  
LOGO ITEM

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## Initial Onboarding/New-Hire Setup



*The initial onboarding/new hire setup is generally handled by HR, the office manager, an administrative assistant, or the business owner.*

### Advance Setup

- Register employee in onboarding session
- Send initial onboarding login link 24 hours prior to session
- Prepare employee record in HR management platform

### Welcome Activities

- Welcome/kickoff
- Introductions
- Icebreaker activity
- Company overview (mission, vision, values)



## VIRTUAL ONBOARDING CHECKLIST

### Policies and Procedures

- Employee handbook
- Harassment prevention policy

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ADDITIONAL POLICIES OR PROCEDURES

- Acknowledgement documentation

### New Hire, Payroll, and Benefits Setup

- Form I-9
- E-Verify (if applicable)
- Wage notice (if applicable)
- Form W-4
- State tax forms (if applicable)
- Benefits elections/notices
- Company directory
- Company platform login details

### Additional Activities

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REQUIRED TRAINING

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- Employee development assessment (if used)
- Next steps

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## In-Department Onboarding



Once the initial onboarding/new-hire setup phase is complete, the manager will work closely with the new hire through the in-department onboarding phase.

### Initial Manager Communication

- Initial 1:1 (manager and new hire)
- Share department/company meeting and event schedule
- Encourage conversations with leaders/personnel in other departments

### Team Interaction

- Meet-the-team session
- Peer buddy assignment
- Individual team member outreach to new hire (voluntary; encouraged by manager)

### Job-Related Training

- \_\_\_\_\_  
JOB-RELATED TRAINING
- \_\_\_\_\_  
JOB-RELATED TRAINING

### Performance Management

- Job performance observations (manager and/or seasoned team members)
- Performance feedback/coaching sessions with manager
- Weekly 1:1 manager/employee conversations
- Performance evaluation/assessment

*Note: This checklist is not exhaustive and is provided for informational purposes only, to illustrate an example outline of a virtual onboarding experience. Feel free to adjust this checklist to match your organization's specific virtual onboarding procedures. Consult with your counsel or tax advisor to ensure compliance with applicable laws.*



# Resources for Further Learning

If you're feeling overwhelmed, remember: you're not alone. Many other business leaders are hard at work developing modified plans for onboarding new employees. For more helpful information and resources, check out our guide to [Navigating the Return to Work](#). It's updated continually updated with answers to frequently asked questions around organizing a safe and optimized return to work.



Want more return-to-work information?

[Download our Preparing the Workplace Checklist here.](#)