THE HFACTOR

New Starter & Onboarding Checklist

A straightforward checklist to help employers create a compliant, organised and welcoming onboarding process.

Before Day One

- [ ] Issue the contract or written statement of employment particulars.
- [ ] Complete right-to-work checks.
- [ ] Confirm payroll, pension and bank-detail processes.
- [ ] Prepare equipment, systems access and a clear induction plan.

First Day & Week

- [ ] Introduce the employee to their manager, team and key contacts.
- [ ] Explain role expectations, working arrangements and communication channels.
- [ ] Cover essential policies, health and safety and data protection.
- [ ] Set initial priorities and schedule regular check-ins.

Probation & Development

- [ ] Set measurable probation objectives.
- [ ] Hold documented review meetings rather than waiting until the end.
- [ ] Address concerns promptly and give the employee a reasonable opportunity to improve.
- [ ] Confirm successful completion, extension or other action in writing.

Employee Experience

- [ ] Explain benefits, wellbeing support and learning opportunities.
- [ ] Provide a point of contact for questions.
- [ ] Check the employee understands how performance and feedback are managed.
- [ ] Ask for onboarding feedback and improve the process where appropriate.

Need support? The HFactor provides practical HR consultancy support for UK employers, including employee relations, TUPE, restructures, redundancy and ongoing HR advisory support.

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This checklist is a general guide and is not a substitute for advice on the facts of a particular case.