STANDARD OPERATING PROCEDURE

New Employee Onboarding SOP

Document no.	SOP-ONB-001
Revision	1.0
Owner	HR Manager
Effective date	September 15, 2026
Review cycle	Every 12 months

1. Purpose

To get a new hire set up, oriented and productive after they accept an offer, with consistent paperwork, equipment and check-ins through their first 90 days.

2. Scope

Starts once a candidate accepts an offer and runs through the 90-day check-in. Recruitment through the signed offer is covered separately, as are day-one logistics and remote-specific steps.

Definitions

New-hire paperwork	The employment agreement, tax forms, direct deposit and identity or eligibility documents collected before or on the first day.
HRIS	The human resources information system where the new hire's core record and onboarding tasks are tracked.
Onboarding buddy	A peer, not the manager, assigned to help the new hire settle in and answer informal questions.

3. Responsibilities

HR Generalist	Sends the welcome packet, collects paperwork, and tracks onboarding tasks to completion in the HRIS.
Hiring Manager	Plans the first-day agenda, assigns a buddy, and builds the new hire's role-specific ramp-up plan.
IT Administrator	Provisions accounts and equipment before the start date and supports setup on day one.
New Employee	Completes required paperwork, attends orientation and takes part in scheduled check-ins.

RACI matrix

Activity	HR Generalist	Hiring Manager	IT Administrator	New Employee
Send welcome packet and paperwork	R/A	I	-	R
Provision accounts and equipment	I	C	R/A	-

Activity	HR Generalist	Hiring Manager	IT Administrator	New Employee
Run orientation session	R/A	C	I	R
Build role-specific ramp-up plan	C	R/A	-	R
Conduct 30-60-90 day check-ins	C	R/A	-	R

R = Responsible, A = Accountable, C = Consulted, I = Informed

4. Materials and PPE

Materials, tools and systems

- HRIS onboarding checklist
- New-hire paperwork packet
- Equipment and account provisioning request form
- Orientation agenda
- 30-60-90 day check-in template
- Benefits enrollment materials

5. Procedure

Step	Task	Owner	Done
5.1	**Kick off onboarding after offer acceptance** As soon as the candidate accepts the offer, the HR generalist creates the onboarding record in the HRIS and starts the onboarding checklist with a confirmed start date.	HR Generalist	☐
5.2	**Send the welcome packet and paperwork** The HR generalist emails the new hire a welcome packet with the new-hire paperwork, start-date logistics and what to expect on day one, with a deadline to return signed documents.	HR Generalist	☐
5.3	**Verify identity and eligibility documents** The HR generalist collects and verifies the required identity and work-eligibility documents before or on the start date, following company policy and local law. **Checkpoint:** Required eligibility documents are verified before the new hire's system access is activated.	HR Generalist	☐
5.4	**Provision accounts and equipment** The IT administrator provisions email, system access and a workstation or laptop based on the equipment request submitted by the hiring manager, aiming to have it ready before the start date.	IT Administrator	☐
5.5	**Plan the first-day agenda** The hiring manager builds a first-day schedule covering introductions, initial tasks and any early meetings, and shares it with the new hire and their assigned buddy ahead of time.	Hiring Manager	☐
5.6	**Assign an onboarding buddy** The hiring manager assigns a peer as an onboarding buddy to help the new hire with informal questions and introductions during the first few weeks.	Hiring Manager	☐
5.7	**Run orientation** The HR generalist runs an orientation session covering company policies, benefits overview, workplace expectations and where to find key resources.	HR Generalist	☐

Step	Task	Owner	Done
5.8	**Start benefits enrollment** The HR generalist gives the new hire access to benefits enrollment materials and explains the enrollment window and deadline, handing off to the benefits enrollment SOP.	HR Generalist	☐
5.9	**Build the role-specific ramp-up plan** The hiring manager creates a ramp-up plan covering the training, introductions and early responsibilities the new hire needs over their first 30, 60 and 90 days.	Hiring Manager	☐
5.10	**Conduct the 30-day check-in** The hiring manager holds a structured check-in at 30 days to review early progress, answer questions and adjust the ramp-up plan if needed. **Checkpoint:** The 30-day check-in covers both how the new hire is settling in and whether initial ramp-up milestones are being met.	Hiring Manager	☐
5.11	**Conduct the 60-day check-in** The hiring manager holds a second check-in at 60 days focused on progress against role expectations and any additional support the new hire needs.	Hiring Manager	☐
5.12	**Conduct the 90-day check-in** The hiring manager holds a final structured check-in at 90 days to review overall performance against expectations, discuss goals going forward, and close out the formal onboarding period.	Hiring Manager	☐
5.13	**Close the onboarding record** The HR generalist confirms every onboarding checklist item is complete and marks the onboarding record closed in the HRIS.	HR Generalist	☐

6. Quality checks

- New-hire paperwork and eligibility documents are complete before or on the start date.
- Accounts and equipment are ready before the new hire's first day.
- Every new hire has a documented 30, 60 and 90-day check-in on file.
- The onboarding checklist in the HRIS is fully complete before the record is closed.

7. Records

- Signed new-hire paperwork
- Equipment and account provisioning confirmation
- Ramp-up plan
- 30-60-90 day check-in notes

8. KPIs

- Percentage of onboarding tasks complete before day one
- New-hire satisfaction score at 30 and 90 days
- Time to full productivity against the ramp-up plan
- 90-day retention rate

9. Common mistakes

- Waiting until the start date to request equipment and accounts.
- Treating orientation as the entire onboarding program instead of one step in it.
- Skipping the 60-day check-in and only doing 30 and 90 days.

- Leaving the ramp-up plan generic instead of tailoring it to the specific role.

10. Revision history

Revision	Date	Description	Reviewed by
1.0	September 15, 2026	Initial release	Alexa Uskova

Approval

Prepared by	Approved by	Date

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