



AUTOMATE **EVERY** EMPLOYEE TRANSITION

HR PREBOARDING CHECKLIST

Better onboarding leads to 82% higher new hire retention and 70% higher productivity.

The good news? A platform like Click Boarding makes every one of the steps easy - and automatically synced to your HRIS.

POST-ACCEPTANCE (TIMING: IMMEDIATE)

Document & Compliance

- Send offer letter for digital signature with a clear deadline
- Issue and collect employment contract and any role-specific agreements (NDAs, IP assignments, non-competes)
- Distribute and collect W-4 and applicable state tax withholding forms
- Initiate I-9 employment eligibility verification with clear instructions on remote or in-person completion
- Collect direct deposit and payroll setup information
- Send benefits enrollment information with deadlines clearly stated
- Issue state-required new hire notices where applicable
- Initiate background check with candidate authorization

Internal Coordination

- Notify relevant departments: IT, payroll, facilities, direct team
- Assign a buddy or peer contact and make the introduction
- Block manager's calendar for Day 1 and first-week check-ins
- Add new hire to relevant team channels and distribution lists (to activate on start date)

Hardware & System setup

- Submit IT provisioning request: laptop, phone, peripherals
- For remote hires: confirm shipping address and dispatch equipment ahead of start date
- Request system access and licenses: email, HRIS, collaboration tools, role-specific software
- Set up SSO credentials and confirm MFA enrollment process
- Request building access or badge provisioning for on-site hires

Any manual communication is a step that could be automated so nothing's missed and HR's real-time updates provide prioritization.



What ROI can you gain from greater automation? Find out in minutes!



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7 DAYS BEFORE START

Welcome Communications

- Send a personalized welcome email or video from the direct manager - not templated!
- Share a welcome message from the broader team or a senior leader
- Introduce the buddy or peer contact with a brief personal note
- Send a digital welcome pack: company story, mission and values, team structure

Role Preparation

- Send a brief pre-read or overview of the team's current priorities
- Introduce any tools or systems the new hire will use on Day 1 with login confirmation
- Confirm training schedule for the first two weeks

Cultural Orientation

- Share the employee handbook digitally with a completion confirmation step
- Provide an overview of communication norms: which tools the team uses, when meetings happen, how people prefer to work
- Share any relevant team rituals, traditions, or informal context that helps new hires feel like insiders before they start
- For on-site or hybrid hires: share office layout, parking information, and any access codes or building procedures

48 HOURS BEFORE START DATE

Logistics Confirmation

- Send a confirmed Day 1 agenda: times, locations, video call links where applicable
- For on-site: confirm parking, building entry, reception instructions, and who'll greet them
- For remote: confirm all system access is active, equipment has arrived and is functional, and video call links for all Day 1 meetings are ready
- For hybrid: specify which days are in-office during week one and what to expect in-office
- Confirm the buddy contact has been briefed and will be available on Day 1

Administrative Confirmation

- Verify all compliance documentation has been completed and collected
- Confirm payroll setup is complete and direct deposit is active
- Confirm background check status and flag any outstanding items to HR
- Verify all system access and equipment is ready to use from minute one

Final Welcome Touchpoint(s)

- Send a brief, warm "see you soon" message from the manager ... it's not a reminder, so this should feel like a true welcome and make them feel really appreciated.
- Include a single point of contact for any last-minute questions or issues (and where to find them, if on-site or hybrid); make sure this person has flexibility to respond if they're needed
- Reiterate excitement about their joining ... it's okay to use an exclamation mark or two! This is the last impression before Day 1 and should be the most emphatic