

Onboarding and Offboarding Checklists Template

Purpose

This template is a basis for you to create your own checklists for onboarding and offboarding staff, specific to your organization's structure, systems, practices, and culture. Since onboarding/offboarding tasks are likely to be performed by many different people (e.g., office manager, IT manager, the person's supervisor), there is space to identify who has responsibility for each item.

As a template, it is intended to apply to many different situations and likely contains more items than will be relevant to any single organization; everything should be assumed to be included only if applicable to your situation. When you make your version, delete anything that is not relevant to your organization. By the same token, no template can include everything that every organization may need. Be sure to add anything else you need that isn't listed!

Preparing to use this template

Before you can customize this to suit your organization, it is helpful to assemble some basic information:

- Make a list of all of the information systems/kinds of accounts used across your organization (e.g., email, file system, database, password manager, phone system, project management system, website CMS, messaging apps, timekeeping, calendars, videoconferencing, internal email lists [e.g., staff@], VPN, bookkeeping). Add them to the first column of the blank form in Appendix: Information Systems and Permissions Inventory.
- Think though and record what kinds of permissions each system offers and the different levels of access available to be granted. See Appendix: Information Systems and Permissions Inventory for an example. Add this information to the second column of the blank form provided. You can then use this for reference as you determine permissioning needs for new users.
- Think through what the proper process is for cutting off access to each system. Add this information to the third column of the blank form provided in Appendix: Information Systems and Permissions Inventory. You can then use this for reference as you determine offboarding practices.
- Make a list of all accounts that the organization maintains that have a single login that multiple people need to access (e.g., Twitter). Although it is always best to make a separate account for any individual who needs access, sometimes it's not possible and that makes it even more important to onboard and offboard people



systematically. Add these accounts to the blank form provided in the Appendix, and fill in criteria for sharing, the credential sharing mechanism, and the steps to take when anyone who has been shared on the account leaves the organization.

- Make a list of installed software in use at your organization. Add your list to the software section below. (Don't forget to include any software used for remote management and support, backup, etc., and anything that your BYOD policy calls for being installed on personal devices.)

Note that all of the above need to be kept up-to-date as information systems and organizational practices changes over time.

Onboarding checklist template

Equipment and information systems

	<i>Who does it</i>	<i>When</i>	<i>Onboarding task</i>
		In advance of start date	Provision computer, peripherals, and cell phone as applicable
		In advance of start date	Make accounts for all systems with appropriate permissions—insert each item from your accounts list in a separate row of this table.
		In advance of start date	Ensure all needed software is installed (or that instructions for people to install are provided)—insert each item from your software list in a separate row of this table.
		When purchased	Add all provisioned equipment and software to relevant inventory tracking system

HR/admin

	<i>Who does it</i>	<i>When</i>	<i>Onboarding task</i>
		As materials come in	Create personnel file
		Upon offer	Offer letter/contract



		At or before start date	W-2 and I-9 or W-9
		On start date	Benefits enrollment forms (specify one on each line if helpful)
		In advance of first payroll run after start date	Set up payroll(and direct deposit if applicable)
		On start date	Get emergency contact info and add to personnel file

Ops/office management

	<i>Who does it</i>	<i>When</i>	<i>Onboarding task</i>
		In advance of start date	Identify their desk and prepare it for occupancy
		In advance of start date	Get them any keys and/or keycards needed
		In advance of start date	Order business cards
		In advance of start date	Do any phone system updates (e.g., get them an extension, change autoattendant message, etc)
		In advance or on start date	Add them to the staff contact list
		In advance in possible	Get bio and picture for website



	As close to start date as possible	Add bio and picture to website
	Within a week of start date	Order them a credit card if applicable
	Within a week of start date	Calendar their birthday celebration according to whatever organizational practices you have around that
	In advance of start date	Organize any other welcoming practices (e.g., announcements to board, staff, community; flowers or other welcome items)
	On or in advance of start date	Send calendar invites for all recurring staff events

Orientation

Best practices

- Map out a two- or three-week schedule
- Don't overdo it: include breaks and consider a reduced schedule, especially the first week (few people can absorb information for 40 hours in a single week!)
- Focus of week 1: paperwork, logistics, starting to understand the organization, training on basic systems (files, messaging, calendaring, timekeeping, password management, possibly project management), setting up internal meetings
- Focus of weeks 2 and 3: internal meetings, learning about programs, training on more complex systems (database, project management), learning and practicing with all systems
- Twice weekly check-ins w/supervisor to answer questions & generate task lists
- One month check-in and starting to talk about workplan through the first 90 days

Orientation—general

	<i>Who gives it</i>	<i>Onboarding task</i>
		Office tour (including printing, copying, mailing, etc) and physical security practices (including alarm codes if applicable)
		Personnel manual and related systems (including time tracking, holidays, vacation requests)
		Operations manual



	Acceptable use policy
	BYOD policy
	Training on all information systems, including security practices
	Information/training on financial procedures (expense reports, reimbursements), including any stipends to support a home office
	Information on recurring events (staff meetings, supervision check ins)
	Introduction to organizational history, mission, vision, values
	Strategic plan, annual plan, program plan, any other relevant plans

Orientation—role specific

	<i>Who gives it</i>	<i>Onboarding task</i>
		Review any documents/materials that contain an answer to the question: What do they need to know in order to make their workplan?

Offboarding checklist template

Equipment, information systems, and office management

	<i>Who does it</i>	<i>When</i>	<i>Offboarding task</i>
		A week before last day	Plan for deactivation of email address (e.g., autoresponder, forward to other staff, be monitored by other staff until deactivated, deactivated right away)
		At end of last day	Deactivate access to all systems—make one line for each and refer to deactivation process from your inventory
		By the day before the last day	Ensure all organizational data on personal devices has been removed (and transferred into an organizational system if it was not living there already)
		At end of last day	Collect all organization-owned equipment
		Within a week of last day	Update all equipment-tracking systems
		By end of last day	Collect keys/keycards
		By end of last day	Cancel credit card
		Within a week of last day	Update staff contact list



		Within a week of last day	Update phone system
		Within a week of last day	Update website

HR/admin

	<i>Who does it</i>	<i>When</i>	<i>Offboarding task</i>
		Upon notice	Create separation letter
		As soon as relevant info is available	Inform payroll company and ensure last check includes the right amount for days worked, any vacation or other payout, and final reimbursements
		On last day	Update health insurance and other benefits providers (specify one on each line)
		On last day	Provide COBRA and/or other relevant benefits forms (specify one on each line if needed)

General management

	<i>Who does it</i>	<i>Offboarding task</i>
		Plan any farewell gestures (flowers or other gift, happy hour, etc.)
		Notify team and appropriate stakeholders of employee departure
		Collaboratively generate list of current projects, internal, and external contacts and other key information for knowledge transfer
		Exit interview

Appendix: Information systems and permissions inventory

Blank forms

System--individual accounts	Permissions available	Deactivation process



	permissions groups are leadership@, staff@, and volunteers@	of work); forward email to another staff for one month; delete
Asana	Access to projects is by team, so add to relevant team(s)	Password reset; audit assigned tasks and owned projects and transfer as needed; delete
CiviCRM database	Permissions by roles: Organizer, Fundraiser, Manager	Deactivate
LastPass	Shared folders in categories relevant to roles/information type	Reset password, harvest necessary credentials to give to other staff as needed; delete
WordPress	Admin, editor, author	Deactivate
Quickbooks	Admin, regular user, reports only; note that only selected staff need any access at all	Deactivate

System--shared accounts	Who needs access?	Sharing method	Post-departure action
Twitter	All with social media post responsibilities	Via LastPass--Social Media folder	Rotate password
GoToMeeting	All who set up and/or host meetings	Via LastPass--No folder, share as needed	Rotate password

Installed software	Configuration notes
Microsoft Office	
Prey Project	Install on org-owned and personal devices
CrashPlan	Do not include music, movies, or photos folders unless on a device used by communications staff
LogMeIn	
GoToMeeting	For those run meetings with external partners, configure to log in as the relevant licensed account

