



Employee Onboarding Checklist

1. Employee Personal Information

- ✓ Full legal name
- ✓ Date of birth
- ✓ Address
- ✓ Contact details (phone number & email)
- ✓ Emergency contact details

2. Employment Documents

- ✓ Signed employment contract
- ✓ Fair Work Information Statement (must be provided to all employees)
- ✓ Casual Employment Information Statement (if applicable)
- ✓ Position description with duties and responsibilities

3. Tax & Superannuation Forms

- ✓ Completed Tax File Number (TFN) Declaration Form
- ✓ Superannuation Standard Choice Form
- ✓ Bank details for payroll

4. Work Eligibility Documents

- ✓ Proof of work rights (passport, birth certificate, or visa details if applicable)
- ✓ Valid identification (e.g., driver's license, Medicare card, or another form of ID)

5. Industry-Specific Requirements

- ✓ Required certifications or licenses (e.g., White Card, First Aid, Working with Children Check, PLSA etc)



6. Workplace Health & Safety Compliance

- ✓ Acknowledgment of workplace policies (safety procedures, anti-discrimination policies, psychosocial safety requirements)
- ✓ Training and induction completion records

7. Payroll & Leave Entitlements

- ✓ Bank account details for wage payments
- ✓ Agreed pay rate and award classification confirmation
- ✓ Timesheet or clock-in process explanation
- ✓ Leave policies and entitlements review

8. Company Equipment & Access

- ✓ Uniforms, tools, or required work equipment
- ✓ Access cards, keys, or security codes
- ✓ Setup of email accounts or internal systems (if required)

9. Trial Period & Performance Review Schedule

- ✓ Trial shift completion (if applicable)
- ✓ Initial performance review schedule (e.g., 3-month probation review)

10. Employee Handbook & Behaviour Expectations

- ✓ Employee handbook issued and acknowledged (ideally signed acknowledgment page)
- ✓ Summary of key expectations: punctuality, communication, mobile use, etc.
- ✓ Overview of performance improvement process or disciplinary procedures

This helps avoid ambiguity from day one and protects the business legally.

11. Policies Acknowledgment

- ✓ Signed acknowledgment of all relevant policies:
 - Code of Conduct
 - Equal Opportunity, Bullying & Harassment
 - Social Media Policy
 - Drug & Alcohol Policy (if relevant)



- Vehicle Use Policy (if driving for work)
- Confidentiality Agreement

12. Technology Access and Permissions (if relevant)

- ✓ Setup for apps or systems (Connecteam, payroll system, CRM, Google Workspace etc.)
- ✓ Login credentials sent securely
- ✓ Brief training on tech platforms (even just a Loom walkthrough video)

13. Team Introduction & Cultural Onboarding

- ✓ Introduced to team or buddy assigned
- ✓ Overview of company mission, values, and goals
- ✓ Invitation to any internal chats or group comms (Slack, WhatsApp, etc.)
- ✓ Welcome message or first-day card (small touch, big culture impact)

14. Legal/Insurance Considerations

- ✓ Added to your **Workers' Compensation Insurance policy**
- ✓ Confirmed coverage under **Public Liability** and **Professional Indemnity Insurance** (if applicable)
- ✓ WorkCover details provided if needed

15. Induction & Training Schedule

- ✓ Full first week mapped out (shifts, who they'll be shadowing, tasks etc.)
- ✓ Any mandatory training scheduled (manual handling, WHS, infection control, etc.)
- ✓ Digital or printed induction checklist shared and signed off

16. Feedback & Check-in Plan

- ✓ Schedule for regular 1:1 check-ins (weekly for first month is ideal)
- ✓ Employee has clear channel to ask questions or flag concerns (especially casuals)