TOTAL CSR

The New-Hire Onboarding Checklist

From accepted offer through the first 90 days

1 Before arrival Employment and HR
2 Payroll benefits and employee records
3 Prepare equipment and system access
4 Record exact access assignments
5 Day one Welcome and orientation
6 Week one Workflows and training
7 Days 30 60 and 90 Review progress
8 Resolve open items and close onboarding

Coordinate the people, paperwork, tools, and training a new employee needs to start well. Use one checklist per hire. The onboarding coordinator follows up across departments; each task has one named owner and a due date.

EMPLOYEE

JOB TITLE

AGENCY / BRANCH

DEPARTMENT

START DATE

WORK LOCATION / STATE

WORK ARRANGEMENT

◯ Onsite ◯ Hybrid ◯ Remote

MANAGER

ONBOARDING COORDINATOR

BUDDY

ASSIGN THE SUPPORT TEAM

Role	Named contact and contact method
HR / people operations	
Payroll and benefits	
IT / device support	
AMS administrator	
Carrier and rater access administrator	
Phone / email administrator	
Training lead	

HOW TO USE THIS CHECKLIST

1. Before the start date, replace suggested owner roles with names and enter actual due dates. HR confirms location-specific requirements and deadlines.
2. Mark Done only after the stated result is confirmed. Record the completion date.
3. Move blocked tasks and NA decisions to page 9. Keep time-sensitive items visible.
4. Review at arrival, end of week one, and days 30, 60, and 90.

Keep sensitive records in approved HR, payroll, and credential systems. Record completion here, not Social Security numbers, bank details, medical information, passwords, or identity documents. This is an operational checklist for U.S. agencies; HR adapts it to the role and jurisdiction.

1 Before Arrival Employment And HR

Complete preparation before arrival where appropriate. Enter the actual deadline for each task; legally required deadlines take precedence over the suggested onboarding stage.

STATUS: **N** = Not started | **P** = In progress | **D** = Done | **B** = Blocked | **NA** = Not applicable

Task and completion standard	Owner name	Due date	Status / done date
01 Signed offer and approved job description on file; compensation, start date, reporting line, and work location confirmed.	HR		
02 Employment classification, schedule, overtime approval process, and any compensation plan confirmed.	HR		
03 Required pre-employment checks completed through the agency's approved process; clearance to start recorded.	HR		
04 Employee record created in HR system; secure invitation sent for personal and emergency contact information.	HR		
05 Form I-9 process assigned; Section 1 and Section 2 due dates scheduled, including the authorized reviewer.	HR		
06 Handbook, required notices, confidentiality and acceptable-use documents issued; acknowledgment dates tracked.	HR		
07 Required state or local new-hire reporting, wage notices, and other location-specific steps identified and assigned.	HR		
08 License status, lines of authority, and appointments checked where applicable; permitted work and restrictions documented.	MANAGER		
09 Welcome message sent with arrival instructions, schedule, dress expectations, parking or remote setup details.	MANAGER		
10 Workspace or equipment delivery arranged; HR support and accommodation request contact provided.	COORDINATOR		

Employment verification deadlines

For Form I-9, Section 1 is generally due no later than the employee's first day of employment. Section 2 is generally due within three business days after that first day; employment lasting fewer than three business days has an earlier requirement. HR confirms the applicable process and deadline using USCIS instructions. See page 9.

SECTION 1 DUE	SECTION 2 DUE	HR CLEARANCE / REMAINING CONDITIONS

2 Payroll Benefits And Employee Records

Set actual dates for the first payroll cutoff, benefit elections, and any required reporting. A benefits invitation alone does not confirm enrollment.

STATUS: **N** = Not started | **P** = In progress | **D** = Done | **B** = Blocked | **NA** = Not applicable

Task and completion standard	Owner name	Due date	Status / done date
01 Payroll profile matches approved pay rate, pay frequency, start date, and work location; payroll cutoff confirmed.	PAYROLL		
02 Signed federal Form W-4 and applicable state or local withholding forms received through the secure process.	EMPLOYEE		
03 Payment method and any required authorization completed securely; employee understands first payday.	EMPLOYEE		
04 Timekeeping login tested; employee shown how to enter time, correct errors, and submit for approval.	PAYROLL		
05 Hours, breaks, attendance reporting, overtime approval, and time-off requests explained for this role and location.	HR		
06 Benefits eligibility, coverage effective dates, employee costs, and election deadline communicated.	BENEFITS		
07 Benefit elections or permitted waivers received and enrollment status confirmed; unresolved elections tracked.	BENEFITS		
08 Retirement plan eligibility, enrollment instructions, and applicable deadlines communicated.	BENEFITS		
09 Required dependent or beneficiary details collected in the benefit system, when applicable.	EMPLOYEE		
10 Expense reimbursement and travel or remote-work policies explained; submission access confirmed.	MANAGER		
11 First pay statement checked with employee after payday; discrepancies routed for correction.	PAYROLL		

FIRST PAYDAY

PAYROLL CUTOFF

BENEFITS ELECTION DEADLINE

COVERAGE EFFECTIVE DATE

OUTSTANDING PAYROLL OR BENEFITS ITEM

HR / PAYROLL COMPLETION CONFIRMED BY

DATE

3 Prepare Equipment And System Access

Manager approves role-based access; the named administrator provisions it. Mark Done only after the employee signs in and completes the relevant test. Use page 5 for exact system names, groups, and scope.

STATUS: **N** = Not started | **P** = In progress | **D** = Done | **B** = Blocked | **NA** = Not applicable

Task and completion standard	Owner name	Due date	Status / done date
01 Laptop or desktop, monitors, headset, charger, and other assigned equipment delivered; asset receipt recorded.	IT		
02 Device sign-in, approved software, updates, endpoint protection, and required network or remote access tested.	IT		
03 Individual identity account activated; required MFA enrolled and approved password setup completed.	IT		
04 Email and calendar work; signature, directory details, meeting tools, and calendar invitations tested.	EMAIL ADMIN		
05 AMS login tested with correct branch, team, accounts, user role, activities, and document permissions.	AMS ADMIN		
06 Each required carrier portal activated; correct agency code, products, and approved actions verified.	PORTAL ADMIN		
07 Comparative rater seat activated; agency profile and approved carrier connections verified.	RATER ADMIN		
08 Phone extension, inbound and outbound calls, transfer, voicemail, and queue membership tested.	PHONE ADMIN		
09 Email groups, shared mailboxes, calendars, and team channels assigned; receipt and approved sending tested.	EMAIL ADMIN		
10 Document folders, templates, e-signature and other required tools available within approved scope.	IT		
11 Training platform invitation accepted; assigned program opens; learning support contact provided.	TRAINING		

EQUIPMENT RECORD LOCATION

IT HELP CONTACT AND BACKUP ESCALATION ROUTE

Use approved samples or read-only checks. Do not submit live quotes, bind coverage, issue documents, or move money to test access. A login does not establish authority or task competence.

4 Record Exact Access Assignments

Copy this page as needed. Include each carrier portal, rater, email group, shared mailbox, and other role-specific system. Keep credentials in the approved system, not on this checklist.

1 Access assignment 1

SYSTEM / GROUP / MAILBOX NAME

APPROVED URL OR LOCATION

AGENCY / BRANCH / PRODUCT / TEAM SCOPE

PERMISSIONS APPROVED AND BY WHOM

PROVISIONER NAME AND CONTACT

DUE DATE

REQUEST / TICKET REFERENCE

EMPLOYEE TEST RESULT AND DATE

STATUS

○ N ○ P ○ D ○ B ○ NA

RESTRICTION OR BLOCKER

2 Access assignment 2

SYSTEM / GROUP / MAILBOX NAME

APPROVED URL OR LOCATION

AGENCY / BRANCH / PRODUCT / TEAM SCOPE

PERMISSIONS APPROVED AND BY WHOM

PROVISIONER NAME AND CONTACT

DUE DATE

REQUEST / TICKET REFERENCE

EMPLOYEE TEST RESULT AND DATE

STATUS

○ N ○ P ○ D ○ B ○ NA

RESTRICTION OR BLOCKER

Phone and mailbox specifics

EXTENSION / DIRECT NUMBER

CALL QUEUES AND UNAVAILABLE ROUTING

SHARED MAILBOX SENDING RIGHTS

☐ Read only ☐ Send as ☐ Send on behalf ☐ Other

MAILBOX AND APPROVED RIGHTS

☐ Voicemail greeting, retrieval, notifications, hold, and transfer verified.

☐ Group messages and shared calendar access verified.

☐ Carrier / rater actions match approved authority.

☐ AMS queues, templates, and email / document integration tested if required.

MANAGER APPROVAL

TEST REVIEWER

5 Day One Welcome And Orientation

The coordinator guides the day. The manager checks that the employee knows where to get help and what work is appropriate to begin.

STATUS: **N** = Not started | **P** = In progress | **D** = Done | **B** = Blocked | **NA** = Not applicable

Task and completion standard	Owner name	Due date	Status / done date
01 Employee welcomed; first-day agenda, team introductions, buddy, and key contacts provided.	COORDINATOR		
02 HR paperwork status reviewed; time-sensitive employment verification steps completed or scheduled within required deadlines.	HR		
03 Office tour or remote orientation completed; badge, keys, parking, and workspace access checked if applicable.	COORDINATOR		
04 Emergency procedures, exits, incident reporting, and appropriate local or remote safety contacts explained.	COORDINATOR		
05 Reporting line, role responsibilities, work hours, communication expectations, and attendance process reviewed.	MANAGER		
06 Handbook questions answered; outstanding acknowledgments and required notices followed up.	HR		
07 Confidential information handling, phishing reporting, approved AI use, and security incident escalation explained.	IT		
08 Day-one systems walkthrough completed with employee; blockers assigned rather than using another person's login.	IT		
09 Agency structure, client segments, carriers, and producer-to-service relationships introduced.	MANAGER		
10 First-week learning schedule and approved practice tasks explained; time protected on the calendar.	TRAINING		
11 End-of-day check-in held; employee questions, missing resources, and next-day priorities recorded.	MANAGER		

EMPLOYEE'S FIRST APPROVED TASK

WHO REVIEWS THAT WORK

REVIEW TIME

Day-one readiness ○ Ready ○ Ready with listed restrictions ○ Blocked

MANAGER

DATE

Issues logged on page 9

6 Week One Workflows And Training

Use demonstrations and work samples to confirm understanding. Assign training around the employee's actual responsibilities; do not assume prior insurance experience means agency workflows are familiar.

STATUS: **N** = Not started | **P** = In progress | **D** = Done | **B** = Blocked | **NA** = Not applicable

Task and completion standard	Owner name	Due date	Status / done date
01 Baseline knowledge and experience reviewed; individual training priorities and support needs recorded.	MANAGER		
02 Role-specific training assigned; daily learning time and manager review points scheduled.	TRAINING		
03 Employee practices documenting a client request, activity owner, next action, and follow-up date in the AMS.	TRAINER		
04 Renewal workflow introduced: due-date tracking, information gathering, submissions, comparisons, approvals, and outstanding items.	TRAINER		
05 Relevant service workflows demonstrated: policy changes, certificates, policy delivery, billing questions, and claim routing.	TRAINER		
06 Authority boundaries clarified: what may be done independently, what needs approval, and where exceptions go.	MANAGER		
07 Approved client communication and file documentation standards practiced using fictional or authorized examples.	TRAINER		
08 Required conduct, security, privacy, or other role and location-specific training assigned with actual deadlines.	HR		
09 Licensing or continuing education plan assigned where relevant; work restrictions and supervision confirmed.	MANAGER		
10 End-of-week work samples reviewed; feedback given; training and workload adjusted.	MANAGER		

FIRST-WEEK LEARNING PRIORITIES

WEEKLY ONE-ON-ONE DAY / TIME

INDEPENDENT WORK PERMITTED NOW

WORK THAT STILL REQUIRES REVIEW

WEEK-ONE CHECK COMPLETED BY

DATE

7 Days 30 60 And 90 Review Progress

Schedule the reviews at the start of employment. Earlier payroll, benefits, reporting, and training deadlines remain due on their assigned dates.

STATUS: **N** = Not started | **P** = In progress | **D** = Done | **B** = Blocked | **NA** = Not applicable

Task and completion standard	Owner name	Due date	Status / done date
01 Day 30: confirm HR records, payroll, benefit elections, equipment, and required access are complete or actively tracked.	HR		
02 Day 30: review representative work for accuracy, documentation, follow-through, and escalation judgment.	MANAGER		
03 Day 30: discuss workload, role clarity, team relationships, and support; agree on the next training priorities.	MANAGER		
04 Day 60: review progress against agreed tasks; practice remaining gaps and adjust the assigned workload.	MANAGER		
05 Day 60: check required training and license-related milestones; resolve overdue items with the responsible owner.	TRAINING		
06 Day 60: review permissions against actual duties; request changes or remove unnecessary access.	MANAGER		
07 Day 90: evaluate demonstrated readiness for the assigned role using work samples and employee feedback.	MANAGER		
08 Day 90: agree on ongoing goals, learning schedule, review expectations, and any remaining support.	MANAGER		
09 Day 90: close onboarding or transfer each open item to a named owner with a review date.	COORDINATOR		

DAY 30 MEETING DATE

OUTCOME / PRIORITIES

DAY 60 MEETING DATE

OUTCOME / PRIORITIES

DAY 90 MEETING DATE

OUTCOME / PRIORITIES

Readiness decisions should reflect demonstrated work and appropriate supervision, not time elapsed or course completion alone.

8 Resolve Open Items And Close Onboarding

Use this page for blockers, approved exceptions, and deferred tasks. Do not mark a required task NA simply because it is unfinished. Copy this page for additional items.

Open item or NA reason	Owner and due date	Next step and reviewer

CONFIRM THE HANDOFF

- ☐ HR and payroll items completed or transferred with explicit deadlines.
- ☐ Access and equipment tested; restrictions documented.
- ☐ Employee knows the support contacts and next development goals.
- ☐ Benefits and required reporting deadlines checked by the responsible owner.
- ☐ Required training and role permissions reviewed.
- ☐ Remaining items have an accountable owner and next review date.

Outcome ◯ Complete ◯ Ongoing items transferred ◯ Further onboarding needed

MANAGER AND DATE

HR / COORDINATOR AND DATE

EMPLOYEE ACKNOWLEDGMENT AND DATE

HR REFERENCE LINKS

HR should confirm current federal, state, local, plan, and agency requirements. Federal references checked September 20, 2026:

USCIS — Form I-9 instructions:
https://www.uscis.gov/sites/default/files/document/forms/i-9instr.pdf

IRS — Hiring employees and Form W-4:
https://www.irs.gov/businesses/small-businesses-self-employed/hiring-employees

Build competence alongside the checklist

Pair a smooth start with structured learning, practice, and manager feedback. Total CSR helps agencies develop the insurance skills new employees need for their assigned work.

TOTAL CSR