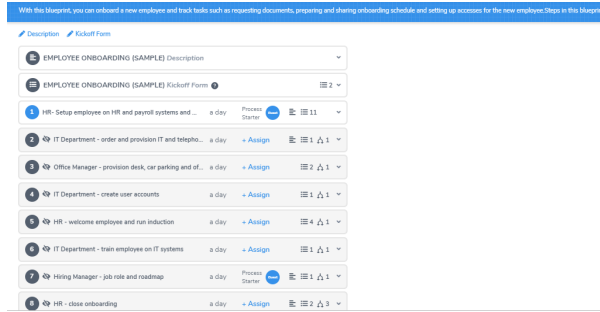


With this blueprint, you can onboard a new employee and track tasks such as requesting documents, preparing and sharing onboarding schedule and setting up accesses for the new employee.

Steps in this blueprint:



Capture-EmployeeOnboardingBP.PNG • 63.1 KB • [Download](#) • [View full size](#)

EMPLOYEE ONBOARDING (SAMPLE)

Employee First Name (Required)

Employee Last Name (Required)

Hiring Manager

Department (Required)

1 HR- Setup employee on HR and payroll systems and send welcome email

Assignees:

Process Starter Guest

Deadline:

1 day after a process is launched

Dear [Employee First Name],

We are excited to have you on the team. This task is a part of your induction process. Please fill in all the information below.

If you have any questions, please do not hesitate to get in touch with me.

Thank you.

Regards,

HR

Employee ID (if assigned)

Personal Email (Required)

Address

Phone (Required)

Date of Birth (Required)

SSN (Required)

Immigration Status

- US Citizen
- Foreign National

Gender

- Male
- Female

Emergency Contact Name

Emergency Contact Phone

Other Information

2

IT Department - order and provision IT and telephone equipment

Assignees:

Process Starter

Deadline:

2 days after Step 1: HR- Setup employee on HR and payroll systems and send welcome email

Name to be printed on ID Card:

[Employee First Name] [Employee Last Name]

Department:

[Department]

Please select what has been set up (Required)

- Desktop computer
- Printer
- Telephone
- ID Card Access

3 Office Manager - provision desk, car parking and office keys

Assignees:

Process Starter

Deadline:

2 days after Step 1: HR- Setup employee on HR and payroll systems and send welcome email

Employee Name:

[Employee First Name] [Employee Last Name]

Hiring Manager:

[Hiring Manager]

Department:

[Department]

Please mark what has been done (Required)

- Desk
 Car parking
 Office keys

What is the assigned car parking spot?

4 IT Department - create user accounts

Assignees:

Process Starter

Deadline:

2 days after Step 2: IT Department - order and provision IT and telephone equipment

Employee Name:

[Employee First Name] [Employee Last Name]

Hiring Manager:

[Hiring Manager]

Department:

[Department]

Select accounts that have been set up

- Email
- Conference calling
- File storage

5  **HR - welcome employee and run induction**

Assignees: Process Starter	Deadline: 5 days after Step 1: HR- Setup employee on HR and payroll systems and send welcome email
--------------------------------------	--

Employee Name:
[Employee First Name] [Employee Last Name]

Hiring Manager:
[Hiring Manager]

Department:
[Department]

Start Date (Required)

Employee Bio

Employee Resume for Database

 Attach file(s)

HR Induction Schedule

 Attach file(s)

6 IT Department - train employee on IT systems

Assignees:

Process Starter

Deadline:

2 days after Step 5: HR - welcome employee and run induction

Employee Name:

[Employee First Name] [Employee Last Name]

Hiring Manager:

[Hiring Manager]

Department:

[Department]

IT Onboarding Course 1 Course 2 Course 3

7 Hiring Manager - job role and roadmap

Assignees:Process Starter **Deadline:**

2 days after Step 5: HR - welcome employee and run induction

Please note: Hiring Manager can be added to this step as a guest user instead of a coworker

Employee Name:

[Employee First Name] [Employee Last Name]

Hiring Manager:

[Hiring Manager]

Department:

[Department]

1st week tasks

- Go over job role and expectations
 - Current project status
 - Introduction to mentor
 - Team/Department Meeting Schedule
-

8

HR - close onboarding**Assignees:**

Process Starter

Deadline:

2 weeks after Step 1: HR- Setup employee on HR and payroll systems and send welcome email

Send Email to concerned HR Manager, IT Admin and Hiring Manager to inform about status of new hire onboarding.

HR and IT onboarding sign-off complete (Required)

- Yes
- No

Hiring Manager onboarding sign-off complete (Required)

- Yes
 - No
-