

Onboarding checklist

Every step for a new hire's start, made for startups, scaleups, agencies and SMBs.

Name	Role / team	Team lead
Contract signed on	First working day	End of probation
		Coordinated by

Tick off on the left what is done. Mark on the right what does not apply to you. The owner is a suggestion. IT means whoever handles IT for you. In small teams one person often has several roles.

As soon as the contract is signed [Prepare](#)

Done	Owner	N/A
☐ Record start date, role and team lead in the HR tool, inform IT and finance	People/Office	☐
☐ Request personal data: tax ID, social security number, health insurer, bank details	People/Office	☐
☐ Check the right to work in Germany if not from the EU, EEA or Switzerland	People/Office	☐
☐ Check whether your industry requires an immediate registration (Sofortmeldung)	People/Office	☐
☐ Order laptop and accessories, or reserve and reset an existing device	IT	☐
☐ Define which tools and permissions the role needs, only as much as necessary	Team lead	☐
☐ Check free licenses, approve new ones	Finance	☐
☐ Choose a buddy and set up the onboarding plan	Team lead	☐
☐ Define a first task the person will own in the first weeks	Team lead	☐
☐ Sort out the workplace: desk, keys, access card, coworking	People/Office	☐

In the week before the start [Set up](#)

Done	Owner	N/A
☐ Create the Google Workspace or Microsoft 365 account with a company email	IT	☐
☐ Create access in the tools with the defined permissions, via SSO where possible	Tool owner	☐
☐ Add to groups, mailing lists and Slack or Teams channels	IT	☐
☐ Enroll the laptop in MDM: encryption, updates, software, test sign-in	IT	☐
☐ Prepare accessories: monitor, headset, mouse, keyboard, adapters	IT	☐
☐ For remote hires, plan shipping so the package arrives before the start	IT	☐
☐ Request a company card if the role needs one	Finance	☐
☐ Send a welcome message: when, where, who meets them, what to bring	People/Office	☐
☐ Inform the team and schedule the first week's meetings	Team lead	☐

On the first day Arrive

Done	Owner	N/A
☐ Hand over laptop and accessories with a handover record (serial number, condition, signature)	IT	☐
☐ Guide the first sign-in: password, two-factor sign-in, password manager	IT	☐
☐ Hand over keys and access card	People/Office	☐
☐ Written statement: parties, pay and working hours provided in writing or text form	People/Office	☐
☐ Give the occupational safety briefing	People/Office	☐
☐ Have the confidentiality agreement and IT policy signed	People/Office	☐
☐ Introduce them to the team, lunch with the buddy	Team lead	☐
☐ Go through the onboarding plan together	Team lead	☐

In the first weeks Ramp up

Done	Owner	N/A
☐ Go through key workflows, contacts and decision paths	Team lead	☐
☐ Register with social security, within six weeks of the start at the latest	People/Office	☐
☐ Retrieve tax data (ELStAM) via the payroll software	Finance	☐
☐ Provide remaining terms of employment if not in the contract (7 days, 1 month)	People/Office	☐
☐ Adjust access: add what's missing, remove what's not needed	Tool owner	☐
☐ Assign laptop and accessories to the person in the inventory	IT	☐
☐ Feedback conversation after the first week	Team lead	☐
☐ After 30 days: what works independently, where is support missing?	Team lead	☐
☐ Probation review well before the probation period ends	Team lead	☐
☐ Review the checklist: everything done and documented	People/Office	☐

Wrap-up For your records

Open items, owners and dates

Completed on

Checked by

Note: This checklist is for guidance and does not replace legal advice. Deadlines and obligations refer to Germany, as of October 2026. If in doubt, ask your payroll provider or accountant whether your industry requires an immediate registration.