Timeline	Task	Additional Details	Completion Date	Notes
Pre-Onboarding Tasks	Send official offer acceptance confirmation	Via email and/or mail.		
	Prepare employment contract and required forms	Employment contract, confidentiality agreements, dresscode requirements, other required forms.		
	Create or gather documents for tax withholding	W-4, state-specific tax forms, etc.		
	Prepare direct deposit authorization forms			
	Complete background checks			
	Confirm drug screening results (if applicable)			
	Verify certifications, licenses, or credentials			
	Add new hire’s information into HRIS or ERP system			
	Initiate payroll setup			
	Prepare benefits enrollment materials	Compile materials for health, dental, and vision insurance, retirement plans (e.g., PERS), and other benefits.		
	Set up a benefits enrollment meeting or portal access			
	Report new hire to state’s New Hire Reporting Program			
	Notify appropriate labor unions of the new hire	Provide the new hire with required labor rights and collective bargaining information, if applicable.		
Onboarding Preparation	Plan orientation schedule and training sessions	Orientation should include an overview of the organization’s mission, vision, and values. Coordinate mandatory ethics, cybersecurity, and harassment prevention training.		
	Coordinate workstation and access setup with IT	Work with IT to arrange access to government systems, email accounts, and time-tracking software. Ensure badge or ID card is issued for security and facility access.		
	Prepare employee handbook and policy documents	Include the code of conduct, conflict of interest policies, and whistleblower procedures.		
	Create physical or digital employee file	Store compliance documents, certifications, and performance records.		
	Inform other departments of the new hire	Include the new hire's start date. Coordinate with Finance if the role affects budget allocations. Inform Payroll, IT, Finance, and Security.		
	Confirm OSHA and public sector health and safety forms	Prepare ergonomic assessments for remote or hybrid setups, if applicable.		
	Prepare compliance training materials	Or coordinate with new hire's manager for training.		

Onboarding Execution	Guide employee through benefits selection	Assist with questions about health insurance, supplemental insurance, or flexible spending accounts.		
	Provide facility tour	Familiarize new hire with facility and common areas while going over safety and security protocols.		
	Introduce available resources	HR, IT support, and departmental resources.		
	Explain communication tools	Overview of email, project management software, and collaboration tools.		
	Gather signed agreements and tax forms			
	Validate I-9 documentation for work eligibility			
	Conduct compliance training sessions	Conduct sessions on ethics in public service, open records policies, or government financial processes.		
	Facilitate public disclosure requirements	Prepare or guide the employee on submitting public records declarations or statements of economic interest, if required.		
	Encourage organization-wide activity	Introduce employee groups, wellness programs, or team activities.		
	Plan periodic HR check-ins	Make sure all onboarding steps are complete.		
Post-Onboarding Tasks	Distribute onboarding satisfaction surveys	This will provide feedback on the process.		
	Update internal and external records	Employee directory, public website, public records, etc.		
	Verify training completion	Store compliance records securely as per public sector guidelines.		
	Audit new hire files for compliance and completeness			
	Document start and end dates of probationary periods	Remind supervisors of evaluation deadlines, if applicable.		
	Hold 30-day check-in	Review initial impressions, challenges, and onboarding feedback		
	Gather onboarding feedback	Collect any surveys conducted and use new hire and mentor feedback to improve onboarding process.		
	Monitor onboarding metrics	Track retention, engagement, and feedback scores to assess program effectiveness. This can be done through an HRIS or ERP system.		
	Adjust process as needed	Based on feedback and updated regulations.		