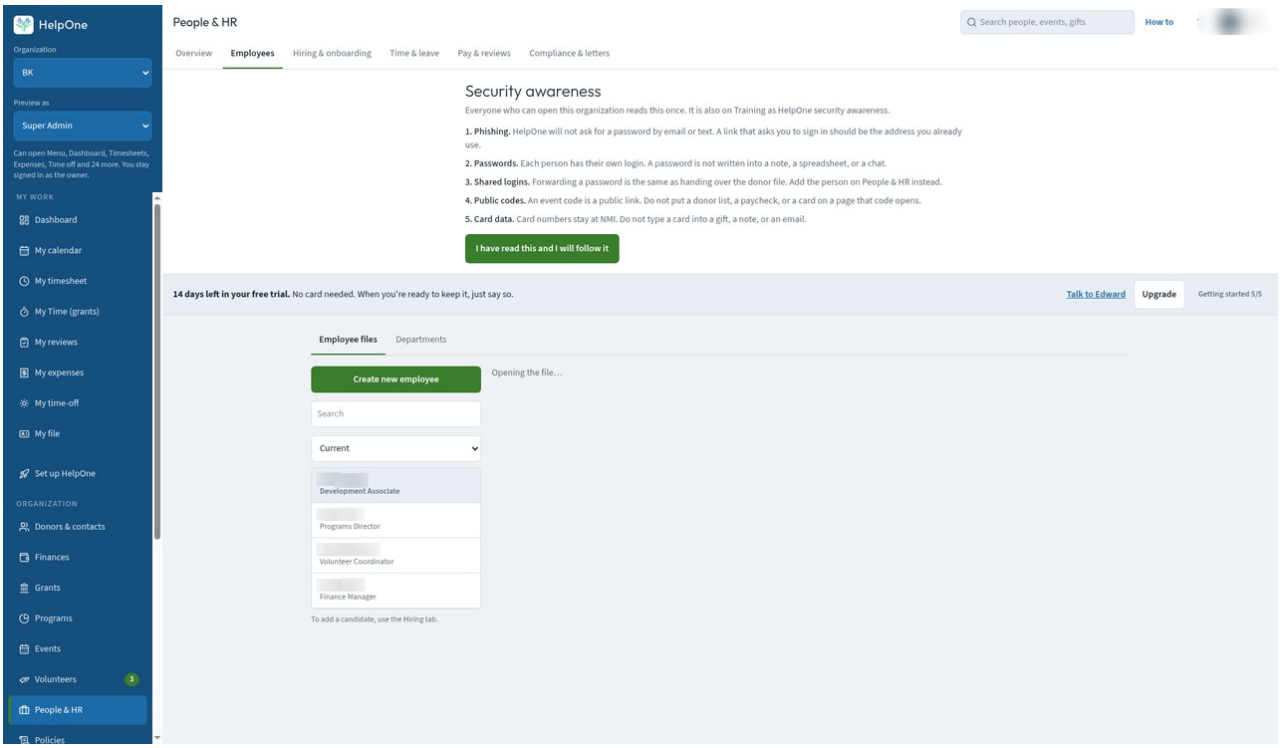
How to run onboarding for a new hire

Last Modified on 10/16/2026 7:14 am EDT

Onboarding collects the forms, policies, and training a new person needs.

Steps

1. Go to People & HR > Hiring & onboarding.
2. Open Onboarding. Click Add staff if the person isn't in HelpOne yet.
3. Use People & HR > Compliance & letters > Checklists & letters for the onboarding checklist and letters.
4. Send policies to sign from Policies > Signatures with Ask for a signature.
5. Check Training due on the Compliance & letters tab, or Training > Due.
6. Have the new hire open My work > My file to see their job, pay, and documents.



Tip: Use the same checklist for every new hire so nothing gets skipped.