

# SOP Template: Onboarding Procedures and Document Collection

This SOP details **onboarding procedures and document collection** to ensure a smooth and efficient integration of new employees. It covers steps from initial welcome and orientation to the systematic gathering of required legal and organizational documents. The process aims to facilitate compliance, streamline administrative tasks, and enhance the overall experience for new hires, setting a foundation for successful employment.

## 1. Purpose

To outline the standardized onboarding process and ensure thorough collection of all necessary documents for each new employee.

## 2. Scope

This procedure applies to all new hires, including full-time, part-time, and temporary employees.

## 3. Responsibilities

- **HR Department:** Oversee the onboarding process and maintain records.
- **Hiring Manager:** Facilitate orientation and introduce the new hire to the team.
- **New Employee:** Provide required documents and complete onboarding activities.

## 4. Procedure Steps

### 4.1 Pre-Onboarding

- Send offer letter and employment agreement for signature.
- Compile and send onboarding welcome package with company information, policies, and a checklist of required documents.
- Coordinate with IT/Facilities to set up workstation, access credentials, and necessary equipment.

### 4.2 First Day Orientation

- Welcome and introduction to the team and office/facilities.
- Present company overview, mission, values, and organizational structure.
- Review policies, code of conduct, and compliance requirements.

### 4.3 Document Collection

- Provide a checklist of required documents to the new hire (see table below).
- Check documents for completeness and accuracy.
- Securely store digital or physical copies in employee personnel file.
- Follow up on any missing or incomplete documents within 5 business days.

Required Document	Description/Purpose	Submitted By	Date Received
Signed Offer Letter	Official acceptance of employment terms	New Hire	
Employment Agreement	Contract outlining terms and conditions	New Hire	
Personal Identification (ID, Passport)	Verification of identity	New Hire	
Tax Forms (W-4, etc.)	For payroll and tax reporting	New Hire	
Direct Deposit Authorization	Banking information for salary payment	New Hire	
Emergency Contact Information	Contact details in case of emergency	New Hire	

### 4.4 Post-Onboarding Follow-up

- Confirm completion of all onboarding tasks within two weeks.
- Schedule check-ins with new hire (30, 60, 90 days) to address questions or concerns.

- Request onboarding feedback to improve the process.

## 5. Records Management

- All collected documents must be securely stored in accordance with company policy and data protection regulations.
- HR maintains an onboarding checklist for each new hire, tracking status and dates of document submissions.

## 6. References

- Employee Handbook
- Data Protection Policy
- Local Labor Law Guidelines

## 7. Revision History

Version	Date	Description	Author
1.0	2024-06	Initial creation	HR Department