

New Employee Onboarding Guide and Checklist

A practical guide for Australian employers

A step by step process for every new employee, from preparing the role to the end of probation. Checklists for each stage, the Business Kitz templates you need along the way, and a one page checklist to print for every new starter.

A Business Kitz guide for Australian small businesses · Financial year 2026/27

Important. This guide is general information to help Australian businesses understand common steps involved in employing and onboarding a new employee. It is not exhaustive, and it is not legal, tax, accounting or financial advice. Laws, rates, thresholds and requirements change, and the obligations that apply to you depend on your circumstances, industry and state. You remain responsible for your own compliance. Check the Fair Work Ombudsman, the ATO, Safe Work Australia, your state or territory work health and safety regulator, the Office of the Australian Information Commissioner and any regulator for your industry directly, subscribe to their updates, and get advice from a lawyer, registered tax agent or accountant before acting. Business Kitz templates are a starting point: each one should be reviewed and tailored to your business, your workforce and any award or enterprise agreement that applies, and using a template does not by itself make a business compliant. To the extent permitted by law, Business Kitz and its related entities accept no liability for any loss arising from reliance on this guide. Prepared for the 2026/27 financial year (1 July 2026 to 30 June 2027).

How to use this guide. Read it through once, then use the stage checklists each time you hire. The printable checklist at the end brings every stage together on one page: print a copy for each new employee, tick items off as you go, and keep it with their employee records.

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Onboarding is more than the first morning

When people think about onboarding, they picture the first morning: a welcome, a desk and a round of introductions. In practice, onboarding starts well before the employee walks in, and continues well after.

It includes **preparing the role, the employment documents, collecting employee information, introducing workplace policies, setting up systems, the workplace induction, training, and early performance management** through to the end of any probation period.

Most small businesses hire only occasionally, which is exactly why steps get missed. Having a repeatable process helps make sure important steps are not forgotten, and creates a more professional and consistent experience for every new employee.

Nothing important is missed

Required steps, such as the Fair Work Information Statement and super choice, happen every time.

A better first impression

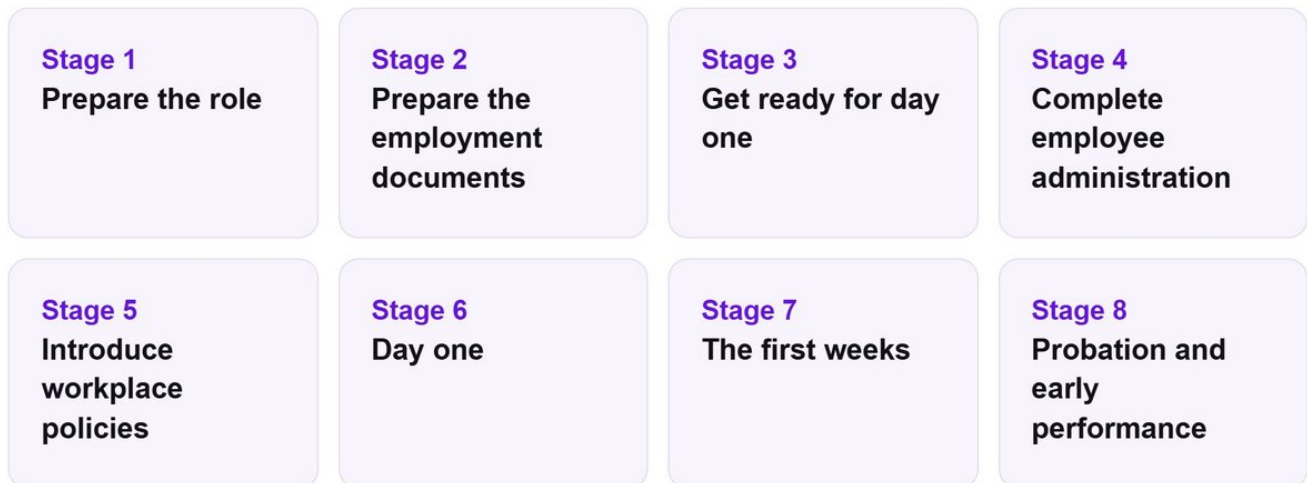
New employees feel expected and valued, and settle in faster.

Records in order

Signed documents and employee details are complete and easy to find later.

Legal requirement or good practice? Some onboarding steps are legal requirements, such as giving every new employee the Fair Work Information Statement, offering eligible employees a choice of super fund, paying at least the minimum rates under the applicable award or agreement, and keeping employee records. Others are good practice that help a new employee settle in and succeed. Throughout this guide, look for **What the law says** and **Good practice** to tell the difference.

The onboarding journey



STAGE 1

1 Prepare the role

Before you advertise or make an offer, be clear about the job. Decisions made here flow through to the employment agreement, pay and award coverage. Getting them right early avoids problems later.

WHAT THE LAW SAYS

The National Employment Standards set minimum conditions for national system employees. Most employees are also covered by a modern award or enterprise agreement, which sets minimum pay rates, classifications, hours and other conditions. Use the Fair Work Ombudsman's Find my award tool and Pay and Conditions Tool ([fairwork.gov.au](https://www.fairwork.gov.au)) to check coverage and rates. Minimum rates usually change from the first full pay period on or after 1 July each year.

GOOD PRACTICE

A written position description clarifies duties, reporting lines and expectations. It also helps you choose the right classification, write the job advertisement and run a fair recruitment process.

STAGE 1 CHECKLIST

- | | |
|---|--|
| ☐ Position description prepared | ☐ Employment type confirmed |
| ☐ Hours confirmed | ☐ Work arrangements confirmed |
| ☐ Applicable minimum employment conditions checked | ☐ Applicable award or enterprise agreement considered |
| ☐ Classification considered where applicable | ☐ Remuneration confirmed |
| ☐ Reporting line confirmed | ☐ Start date confirmed |

FIND IT IN BUSINESS KITZ

Approval to recruit staff

Use it to confirm the role, budget and approval before you start recruiting.

Job advertisement

Use it to advertise the role clearly and consistently.

Job interview guide and questions

Use it to structure interviews and compare candidates consistently.

Job position description

Use it to set out duties, reporting lines and requirements.

Job interview tips

Use it to prepare for interviews and keep them fair.

Referee report

Use it to record reference checks with the candidate's permission.

Business KitZ supports you before onboarding even begins: from getting approval to hire, through advertising and interviewing, to checking references.

Keep interviews fair. Ask questions that relate to the role. Avoid questions about protected attributes such as age, pregnancy, family responsibilities, religion or disability, unless they genuinely relate to the inherent requirements of the job.

2

Prepare the employment documents

Put the terms of employment in writing before the employee starts. A written employment agreement sets out the role, pay, hours and conditions, and reduces the risk of misunderstanding on both sides.

WHAT THE LAW SAYS

Every new employee must be given the **Fair Work Information Statement** before, or as soon as possible after, they start. Casual employees must also be given the **Casual Employment Information Statement**, and fixed term employees the **Fixed Term Contract Information Statement**. Most awards require the regular hours of part time employees to be agreed in writing. Visa holders must have the right to work in the role. A written employment agreement is not legally required in every case, but it is strongly recommended.

GOOD PRACTICE

Send the employment agreement and starter documents for signing before day one, so the first day is about the job rather than paperwork. Save signed copies where you can find them quickly.

STAGE 2 CHECKLIST

- | | |
|---|--|
| ☐ Employment agreement chosen to match the employment type | ☐ Award or agreement, classification and pay checked in the agreement |
| ☐ Part time hours agreed in writing where required | ☐ Work rights checked for visa holders, for example through VEVO |
| ☐ Employment agreement signed before day one | ☐ Fair Work Information Statement provided |
| ☐ Casual or fixed term information statement provided where it applies | ☐ Employee details template sent to the employee |
| ☐ Signed documents saved to the employee's records | |

FIND IT IN BUSINESS KITZ

 **Employment agreement casual**

 **Employment agreement part time**

 **Employee details**

Use it to collect contact, payment and emergency details.

 **Employment agreement full time**

 **Fair Work Information Statement**

Check it matches the current version published by the Fair Work Ombudsman.

The right documents depend on the employment arrangement and circumstances. Choose the agreement that matches how the person will actually work, check it against the applicable award or agreement, and get advice for unusual arrangements. The Casual Employment and Fixed Term Contract Information Statements can be downloaded from [fairwork.gov.au](https://www.fairwork.gov.au).

Our tip: send information statements for viewing, not just by email. Send the Fair Work Information Statement through Business Kitz Document Sign as view only. The employee opens and confirms it, and you have a dated record that they received and viewed it. Send the employment agreement for signature the same way.

Want more support? Book a demo with Business Kitz.

Prepare employment agreements and starter documents, send them for signing, and keep every signed copy in the Employee Profile.

[Start free today](#)

[Book a demo](#)

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Get ready for day one

The days before someone starts shape their first impression. A prepared workspace, working logins and a clear plan for the first day tell a new employee they are expected and valued. They also mean the first week is spent learning the role, not waiting for access.

STAGE 3 CHECKLIST

- | | |
|---|---|
| ☐ Manager notified | ☐ Team notified |
| ☐ Workspace prepared | ☐ Equipment prepared |
| ☐ Email and systems access organised | ☐ Induction schedule prepared |
| ☐ Required training identified | ☐ First day meetings scheduled |



FEATURED TEMPLATE

New staff induction checklist

One of the most useful practical resources for any employer. Work through it with each new employee so every induction covers the same essentials and nothing is missed. Print a copy for each new starter, tick items off as you go, and keep the completed checklist with their records.

FIND IT IN BUSINESS KITZ

 **New staff induction checklist**
Use it to run a consistent induction for every new employee.

 **Induction policy**
Use it to set out how your business welcomes and inducts new employees.

 **New supervisor induction checklist**
Use it when a new employee will supervise others, or an existing employee steps into a supervisory role.

 **Employee manual for business**
Use it to bring key information and workplace expectations together in one place.

4

Complete employee administration

Collect the information you need to pay the employee correctly, meet your tax and super obligations, and contact someone in an emergency. Collect only what you need, store it securely, and limit who can see it.

WHAT THE LAW SAYS

Tax. New employees provide their tax file number and tax free threshold choice through a tax file number declaration. Many employees can now complete this online through the ATO's online services via myGov. Your payroll software or adviser can confirm how the information is reported to the ATO. Tax file numbers have strict legal protections on how they are collected, used and stored.

Super. Offer eligible employees a choice of super fund, usually within 28 days of starting, using the ATO standard choice form. If they do not choose, request their stapled super fund details from the ATO before using a default fund. From 1 July 2026, under payday super, contributions must generally reach the employee's fund within 7 business days of each payday.

Pay and records. Pay at least the applicable minimum rates, report each pay through Single Touch Payroll, issue pay slips within one working day of payday, and keep employee records for 7 years.

GOOD PRACTICE

Collect everything before the first pay run, check it for accuracy, and save it in one secure place with access limited to the people who need it.

STAGE 4 CHECKLIST

- | | |
|---|--|
| ☐ Employee details collected | ☐ Tax information completed through the appropriate process |
| ☐ Superannuation information collected through the appropriate process | ☐ Payment information collected |
| ☐ Emergency contact recorded | ☐ Relevant licences or qualifications recorded where required |

FIND IT IN BUSINESS KITZ

Employee details

Use it to collect personal, payment and emergency contact details.

Superannuation choice

Check it matches the current ATO standard choice form.

Tax file number declaration

Check it matches the current ATO version, or use the ATO's current online process.

Fair Work Information Statement

Check it matches the current Fair Work Ombudsman version.

Government forms change from time to time. Before each new starter, check that the forms you use match the current versions published by the ATO and the Fair Work Ombudsman, and confirm the details with your bookkeeper, payroll provider or accountant.

Keep it all in one place. Save each completed form to the employee's Employee Profile in Business Kitz, where every new starter document becomes a tick box with the date and the signed copy attached. Put licence and qualification expiry dates in Key Dates so you are reminded before they lapse.

5

Introduce workplace policies

Onboarding is the best opportunity you will have to introduce workplace expectations. A new employee is ready to learn how things work, and introducing policies early means expectations are clear before any issue arises. Explain the key points in person rather than simply handing over a pile of documents.

STAGE 5 CHECKLIST: POLICIES INTRODUCED

- | | |
|---|--|
| ☐ Code of conduct | ☐ Workplace health and safety |
| ☐ Anti bullying | ☐ Equal opportunity and anti discrimination |
| ☐ Leave | ☐ Confidentiality |
| ☐ Workplace privacy | ☐ Acceptable use |
| ☐ Internet and email | ☐ Social media |
| ☐ Grievances | ☐ Probation |

FIND IT IN BUSINESS KITZ

- | | |
|---|---|
|  Code of conduct policy |  Workplace health and safety policy |
|  Anti-bullying policy |  Equal opportunity and anti-discrimination policy |
|  Leave policy |  Confidentiality policy |
|  Workplace privacy policy |  Acceptable use policy |
|  Use of internet and email policy |  Use of social media policy |
|  Grievance policy |  Probation policy |



ALSO IN BUSINESS KITZ

Staff policy and procedures confirmation

Use this letter to ask employees to confirm they have read and understood the policies they have been given, and keep the confirmations on file. A record of acknowledgement can help support your policy acknowledgement process and show that expectations were communicated. It works best alongside a proper explanation of the policies, not instead of one.

Want more support? Book a demo with Business Kitz.

Introduce your workplace policies with confidence, and keep a dated record of what each employee received and confirmed.

[Start free today](#)[Book a demo](#)businesskitz.com.au

3

Need to review your workplace policies?

See the Business Kitz guide, **Top Policies and Procedures Every Business Needs**.

Day one

The first day sets the tone. Aim for a warm welcome, the essentials of safety and systems, and a clear picture of the role and what comes next. Avoid filling the day with paperwork that could have been done before the employee started.

STAGE 6 CHECKLIST

- | | |
|--|---|
| ☐ Welcome the employee | ☐ Introduce the team |
| ☐ Explain the business | ☐ Review the employee's role |
| ☐ Explain immediate priorities | ☐ Complete workplace induction |
| ☐ Explain safety and emergency procedures | ☐ Confirm systems access |
| ☐ Explain working hours and attendance | ☐ Introduce workplace policies |
| ☐ Explain where documents and policies can be found | ☐ Explain who the employee can approach with questions |
| ☐ Schedule a first week check in | |

An example day one plan

Adapt the timing to your workplace. The point is to have a plan, so the day does not depend on who happens to be available.

WHEN	WHAT TO COVER
Arrival	Welcome, workspace, building access, facilities and introductions to the team
Morning	Workplace induction, safety and emergency procedures, how to report hazards and incidents
Midday	Lunch with the manager or a colleague who can answer everyday questions
Afternoon	Systems access, the role and immediate priorities, working hours, key policies and where to find them
End of day	A short check in: how did the day go, what questions are there, and what happens tomorrow



FIND IT IN BUSINESS KITZ

New staff induction checklist

Use it on day one to work through the induction with your new employee, so nothing is missed and every new starter receives the same information. Keep the completed checklist with their records as a record of what was covered.

STAGE 7

7

The first weeks

The first few weeks are when a new employee works out whether they made the right decision, and when you see how they approach the role. Regular, short check ins catch problems while they are small and help the employee become productive sooner.

STAGE 7 CHECKLIST

- | | |
|---|---|
| ☐ Set clear priorities | ☐ Provide role specific training |
| ☐ Explain key workflows | ☐ Schedule manager check ins |
| ☐ Confirm performance expectations | ☐ Check the employee has the tools they need |
| ☐ Address questions early | ☐ Discuss progress |

A simple check in rhythm

1

End of week one

How is it going? What is unclear? Is anything missing, from equipment to access to training?

2

Week two or three

Review priorities and early work. Give specific feedback on what is going well and what to adjust.

3

End of month one

Discuss progress against expectations, agree goals for the coming months and note any support needed.

FIND IT IN BUSINESS KITZ

 **Performance review discussion plan**
Use it to structure a progress conversation at the end of the first month.

 **Meeting record with employee**
Use it to note what was discussed and agreed at each check in.

 **Timesheet template**
Use it where employees need to record the hours they work.

STAGE 8

8 Probation and early performance

Where probation applies, employers can use this period to establish expectations, provide feedback and address concerns early. It is a chance for both sides to confirm the role is the right fit, and works best when feedback is regular and nothing at the final review comes as a surprise.

WHAT THE LAW SAYS

Probation is not defined in the Fair Work Act. Whether a probation period applies, and on what terms, usually depends on the employment agreement or applicable award. The employee's entitlements, including the National Employment Standards, continue during probation. Separately, the unfair dismissal laws have a minimum employment period: 6 months, or 12 months for a small business employer with fewer than 15 employees. A probation period does not change it. Notice and other requirements in the agreement, award and the National Employment Standards still need to be checked before ending employment.

GOOD PRACTICE

Set review points, such as a midpoint and a final review, give clear and documented feedback, raise concerns early, and confirm the outcome in writing before the probation period ends.

1**Start**

Explain how probation works and what success looks like.

2**Midpoint review**

Discuss progress, give feedback and agree any changes.

3**Final review**

Assess performance against the agreed expectations.

4**Confirm in writing**

Tell the employee the outcome before the period ends.

**FIND IT IN BUSINESS KITZ****Probation policy**

Use it to explain how probation works in your business.

**Performance review tool**

Use it to assess performance against agreed expectations.

**Unsuccessful probation**

Use it to confirm the outcome where probation has not been successful, after taking advice.

**Performance review discussion plan**

Use it to structure the midpoint and final reviews.

**Successful probation**

Use it to confirm the employee has completed probation.

If performance concerns arise

Most concerns can be resolved with an early, honest conversation and clear support. Where concerns continue, during or after probation, Business Kitz also provides documents to help you manage the process fairly and keep a record.

WHERE PERFORMANCE CONCERNS ARISE

 **Underperformance initial steps checklist**

 **Performance improvement plan**

 **Meeting record with employee**

 **Final warning letter**

 **Underperformance formal steps checklist**

 **Underperformance meeting plan**

 **First warning letter**

IF EMPLOYMENT ENDS

 **Termination of employment letter**
Use it to confirm the end of employment in writing, after taking advice.

 **Fair Work ending employment fact sheet**
Use it to give the employee information about ending employment.

 **Employee confirmation of deletion of confidential information**
Use it to confirm business information has been removed from personal devices and accounts.

Do not assume every document should be used in every situation. Choose the steps that suit the circumstances, and get advice before issuing a final warning or ending someone's employment.

Unsure whether to end employment during probation, or facing a dispute with a new employee? Get legal advice early, before you act. Legal Kitz can help: [book a consultation](#).

Want more support? Book a demo with Business Kitz.

Track probation reviews in Key Dates and keep every review, plan and letter in one place.

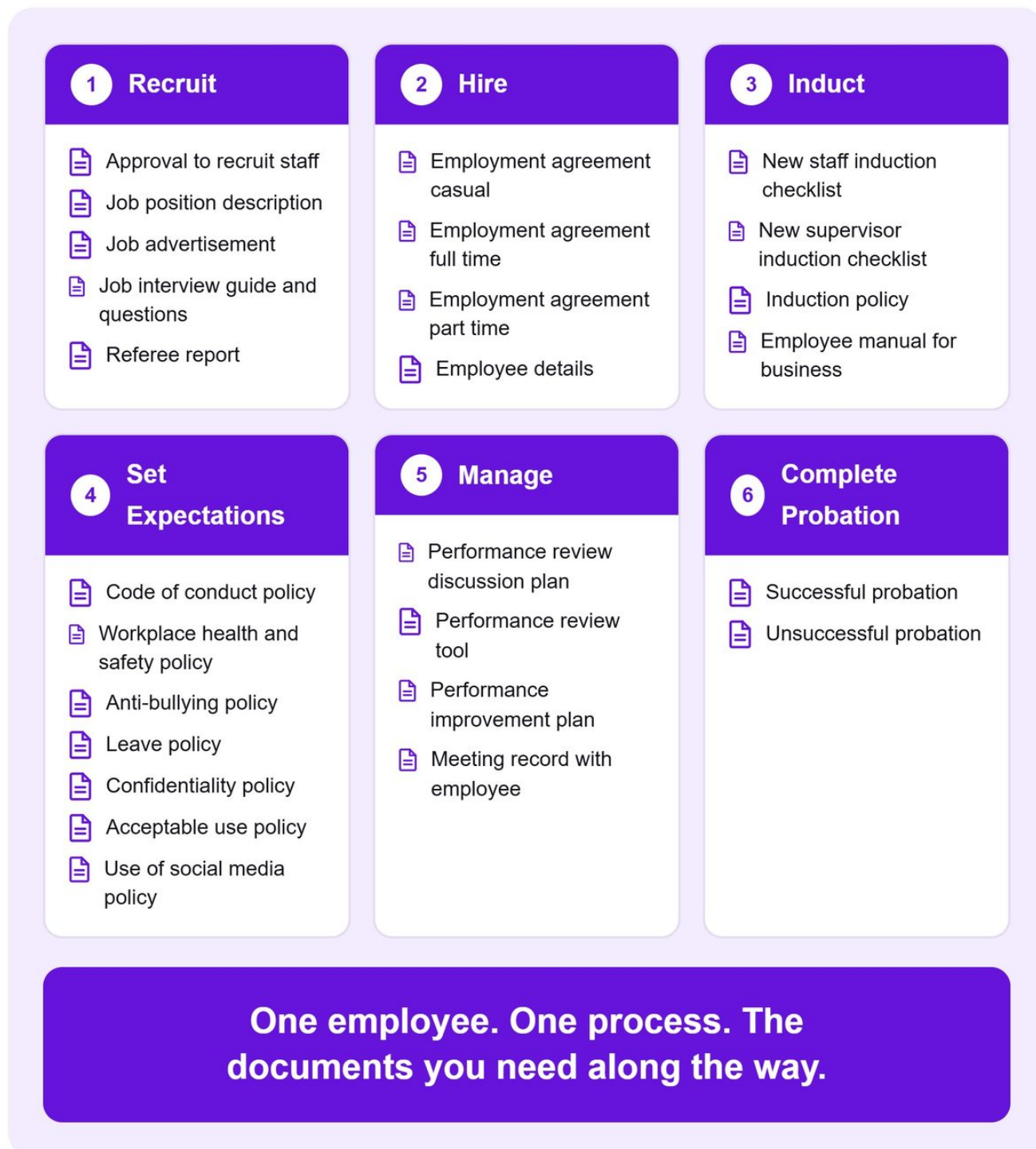
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The documents you need, at every step

From the decision to hire through to the end of probation, Business Kitz has a template ready for each step. Here is the whole journey on one page.



Templates are a starting point. Choose the documents that suit each employee and situation, and tailor them to your business and any award or enterprise agreement that applies.

More than a template library

Agreements and policies, ready to go

A library of 115+ templates, including employment agreements, workplace policies and onboarding documents, with AI to help you tailor them to your business.

Signing with an audit trail

Send documents for signature or view only through Business Kitz Document Sign. Every signature is dated and recorded, so you can show what each employee was given and when.

Employee onboarding checklists

Every new starter document becomes a tick box on the Employee Profile, so nothing is missed on day one.

Key Dates and reminders

Probation reviews, licence expiries and other dates tracked, with reminders before they fall due.

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More time building your business.**

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Free help you can call

SERVICE	WHAT THEY HELP WITH	HOW TO REACH THEM
Fair Work Ombudsman	Pay rates, awards, information statements, hiring, leave, probation and ending employment. Free advice for employers, including a small business line	13 13 94, fairwork.gov.au
Australian Taxation Office	Tax file number declarations, PAYG withholding, super choice, stapled super, payday super and Single Touch Payroll	13 28 66, ato.gov.au
Safe Work Australia and your state or territory regulator	Work health and safety duties, inductions and incident notification	safeworkaustralia.gov.au
Department of Home Affairs	Checking a visa holder's work rights through VEVO	immi.homeaffairs.gov.au
business.gov.au	Hiring your first employee, and where to go for help	13 28 46, business.gov.au

Sources

- Fair Work Ombudsman: Fair Work Information Statement, Casual Employment Information Statement, Fixed Term Contract Information Statement, National Employment Standards, pay slips and record keeping, unfair dismissal minimum employment period (fairwork.gov.au)
- ATO: tax file number declarations, super choice and stapled super, payday super, Single Touch Payroll (ato.gov.au)
- Safe Work Australia: model work health and safety laws (safeworkaustralia.gov.au)
- Department of Home Affairs: Visa Entitlement Verification Online (immi.homeaffairs.gov.au)

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New employee onboarding checklist

Print one for each new employee and keep it with their records.

EMPLOYEE NAME

ROLE

START DATE

MANAGER

1 Before hiring

- ☐ Position description prepared
- ☐ Employment type, hours and arrangements set
- ☐ Award or agreement and classification checked
- ☐ Remuneration and reporting line confirmed
- ☐ Interviews and reference checks completed
- ☐ Start date confirmed

Business Kitz: Job position description · Job interview guide and questions · Referee report

2 Employment documents

- ☐ Correct employment agreement prepared
- ☐ Part time hours agreed in writing, if applicable
- ☐ Work rights checked for visa holders
- ☐ Agreement signed before day one
- ☐ Fair Work Information Statement provided
- ☐ Casual or fixed term statement, if applicable

Business Kitz: Employment agreement casual, full time or part time · Fair Work Information Statement

3 Employee information

- ☐ Employee details completed
- ☐ Tax file number declaration completed
- ☐ Super choice offered and fund details collected
- ☐ Bank and emergency contact details recorded
- ☐ Licences or qualifications recorded, if required

Business Kitz: Employee details · Tax file number declaration · Superannuation choice

4 Before day one

- ☐ Manager and team notified
- ☐ Workspace and equipment prepared
- ☐ Email and systems access organised
- ☐ Induction schedule prepared
- ☐ Required training identified
- ☐ Payroll set up before the first pay run

Business Kitz: New staff induction checklist · Induction policy

5 Day one

- ☐ Welcome and team introductions
- ☐ Business, role and priorities explained
- ☐ Workplace induction completed
- ☐ Safety and emergency procedures explained
- ☐ Hours, attendance and systems confirmed
- ☐ Key policies introduced and location shown
- ☐ First week check in scheduled

Business Kitz: New staff induction checklist · Staff policy and procedures confirmation

6 First week

- ☐ Priorities set and role training started
- ☐ Key workflows explained
- ☐ Tools and access checked
- ☐ Questions addressed early
- ☐ End of week check in held

Business Kitz: Meeting record with employee

7 First month

- ☐ Regular manager check ins held
- ☐ Performance expectations confirmed
- ☐ Progress discussed and feedback given
- ☐ Policy acknowledgements on file
- ☐ Goals agreed for the coming months

Business Kitz: Performance review discussion plan

8 Probation

- ☐ Probation terms explained, if applicable
- ☐ Midpoint review held and documented
- ☐ Concerns raised early, with support
- ☐ Final review completed before the end date
- ☐ Outcome confirmed in writing

Business Kitz: Probation policy · Performance review tool · Successful probation · Unsuccessful probation

EMPLOYEE NAME	ROLE	START DATE	MANAGER

KEY DATE	GENERAL TIMING	DUE DATE	DONE
Start date	Day one		☐
Fair Work Information Statement provided	Before, or as soon as possible after, starting		☐
Super choice offered	Usually within 28 days of starting, if eligible		☐
First week check in	End of week one		☐
First month review	End of month one		☐
Probation midpoint review	Midpoint, if probation applies		☐
Probation final review	Before the probation end date		☐
Probation outcome confirmed in writing	Before the probation end date		☐
Minimum employment period reached	6 months, or 12 months for a small business employer		☐
Licence or qualification expiry	As recorded, if required		☐

Notes

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Top Policies and Procedures Every Business Needs

Part of the same Business Kitz resource series for Australian small businesses.

Need legal advice? Legal Kitz can help: [book a consultation](#).