

30-60-90 Day New-Hire Check-In Kit

Three structured conversations for clearer expectations, earlier support, and documented follow-through.

PURPOSE	Help managers and employees align on role expectations, progress, support needs, and next actions throughout the first 90 days.
BEST FOR	Managers, HR partners, and new employees. Use each section as a conversation guide and retain documentation according to organizational policy.

Employee name	_____	Role / department	_____
Manager	_____	Start date	_____
Work location	_____	Review period	_____
Meeting date	_____	HR partner	_____

30-day check-in | Orientation and clarity

DONE	CONTROL / REVIEW ITEM	EVIDENCE OR NOTES
[]	The employee can explain the role's core responsibilities and near-term priorities.	
[]	Required systems, equipment, access, policies, and training are available or assigned.	
[]	The manager clarified what success looks like during the next 30 days.	
[]	The employee identified questions, barriers, workload concerns, or additional support needs.	
[]	Early feedback was specific, balanced, and supported by examples.	
[]	Action items have owners and completion dates.	



30-day discussion notes

Review and sign-off

Employee

_____ Date: _____

—

Manager

_____ Date: _____

—



60-day check-in | Progress and capability

DONE	CONTROL / REVIEW ITEM	EVIDENCE OR NOTES
[]	Progress against the 30-day action plan was reviewed.	
[]	Role knowledge, quality, reliability, communication, and collaboration were discussed.	
[]	The employee received clear examples of strengths and development priorities.	
[]	Training, coaching, workload, or process changes were identified where needed.	
[]	Goals for days 61-90 are measurable and connected to role expectations.	
[]	Any concern requiring HR support or a separate performance process was escalated appropriately.	

60-day discussion notes

Review and sign-off

Employee

_____ Date: _____

Manager

_____ Date: _____



90-day check-in | Alignment and next-stage plan

DONE	CONTROL / REVIEW ITEM	EVIDENCE OR NOTES
☐	The employee's overall progress and examples of contribution were reviewed.	
☐	Outstanding onboarding items or barriers were resolved or assigned.	
☐	Ongoing performance expectations and recurring responsibilities were confirmed.	
☐	Development goals, learning priorities, and future check-in cadence were agreed.	
☐	The employee had an opportunity to share onboarding feedback and recommendations.	
☐	The manager documented the outcome and any follow-up required under organizational policy.	

90-day discussion notes

Review and sign-off

Employee	_____	Date: _____
	—	
Manager	_____	Date: _____
	—	
HR, if applicable	_____	Date: _____
	—	

Action plan

ACTION / SUPPORT NEEDED	OWNER	DUE DATE	STATUS

ACTION / SUPPORT NEEDED	OWNER	DUE DATE	STATUS

Reference links

- **U.S. Department of Labor new-hire resources:** <https://www.dol.gov/general/topic/hiring>
- **Lvl Haus Resources:** <https://www.lvlhaus.com/resources/>

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