How to use the onboarding plan

1 Choose the language in Onboarding B3. Enter a record ID, start date, role and manager in the blue cells.

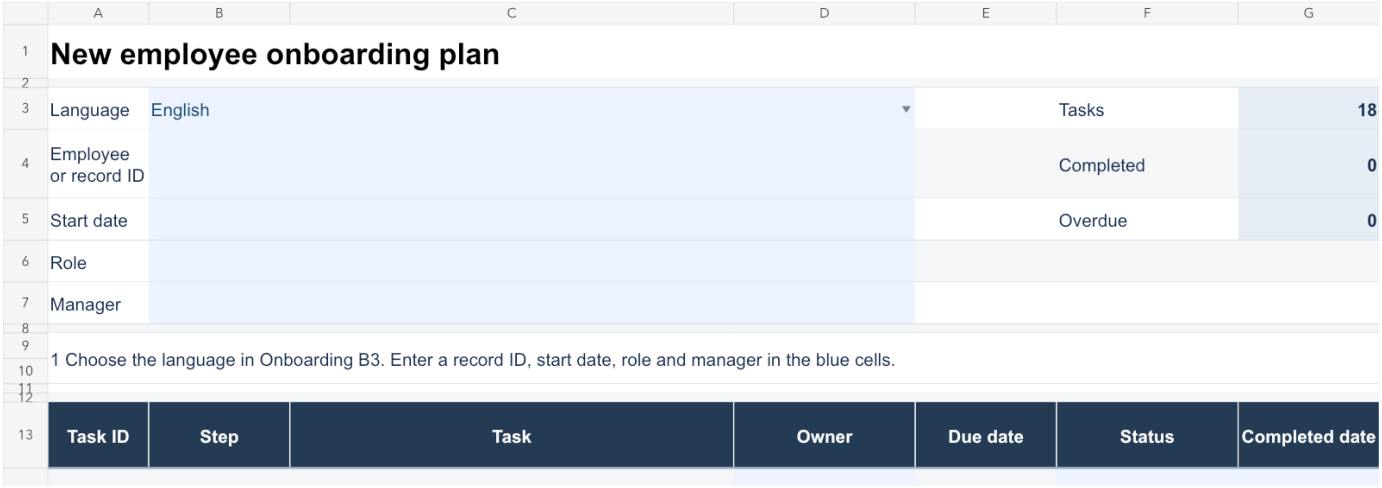
2 The due date equals the start date plus the days offset. These are calendar day planning targets, not legal deadlines. Change the offsets to match your process.

3 Assign one owner and use NOT_STARTED, IN_PROGRESS, COMPLETE or BLOCKED in Status. Enter the actual completion date separately.

4 Use a link or short reference for evidence. Keep identity documents, SSNs, banking and medical information in the approved secure system, not here.

5 Review overdue tasks and blockers with the manager. Twelve blank rows are available for your own tasks. Retain Task IDs when sorting.

6 The day thirty, sixty and ninety meetings are suggested checkpoints. Statutory forms, notices and benefit deadlines must be scheduled separately using the current rules and actual plan documents.



	A	B	C	D	E	F	G
1	**New employee onboarding plan**						
2							
3	Language	English				Tasks	18
4	Employee or record ID					Completed	0
5	Start date					Overdue	0
6	Role						
7	Manager						
8							
9							
10	1 Choose the language in Onboarding B3. Enter a record ID, start date, role and manager in the blue cells.						
11							
12							
13	**Task ID**	**Step**	**Task**	**Owner**	**Due date**	**Status**	**Completed date**

Check

NOT_STARTED Work has not begun

IN_PROGRESS Work is underway

COMPLETE Work is finished and checked

BLOCKED A named issue needs action

Function

IF with AND and ISNUMBER leaves the due date blank until a valid start date, task and days offset exist. Start date plus offset gives the target date.

COUNTA counts task IDs. COUNTIF and COUNTIFS count completed or overdue tasks; TODAY supplies the current date.

INDEX and MATCH switch labels and task descriptions using the language selector. Task IDs and status codes stay stable when the language changes.