

# New Staff Onboarding Checklist

**Organization:** Tree ([tree.com.hk](http://tree.com.hk))

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**Approved by:**

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**Version:** NSO-v1.0

**Related policy:** System User Access Management · Computer Operations

## Staff details

- Staff name: \_\_\_\_\_
- Department / role: \_\_\_\_\_
- Start date: \_\_\_\_\_
- Requested by (Manager / HR): \_\_\_\_\_
- Handled by (Admin / IT): \_\_\_\_\_

## Before start date (Admin / Manager)

- ☐ Confirm start date and job role
- ☐ Submit access request to Admin (Level 1)
- ☐ Confirm which systems are needed:
  - ☐ Office PC (local user — **no admin rights**)
  - ☐ [tree.com.hk](http://tree.com.hk) email
  - ☐ File server (personal folder + shared folders)
  - ☐ QuickBooks
  - ☐ POS
  - ☐ Online sales system

## Day 1 — Account & PC (Admin → escalate to IT if needed)

- ☐ Create **local user account** on office PC (standard user, no admin)
- ☐ Create / enable [tree.com.hk](mailto:tree.com.hk) email account
- ☐ Create **file server personal folder**
- ☐ Grant shared folder access (job need only)
- ☐ Grant app access if approved (QuickBooks / POS / online sales)
- ☐ Set initial password; user must change on first login
- ☐ Confirm MFA if the application supports it

## Day 1 — Staff briefing (Admin)

- ☐ How to save files to **file server personal folder** (PC local drive is **not** backed up)
- ☐ Cannot install software — request Admin / IT
- ☐ Lock screen when away from desk
- ☐ Give [Email Security Guideline](#)
- ☐ How to report problems: **Admin first (L1)** → IT (L2)

## Completion (internal record only)

- Admin / IT marks the checklist complete and notes that briefing / access setup was **acknowledged** verbally or by email where practical.
- Completed by (Admin / IT): \_\_\_\_\_ Date: \_\_\_\_\_
- Notes (optional): \_\_\_\_\_