FREE CHECKLIST

Hiring your first employee, the checklist

Before your first employee starts, get an EIN, register for state payroll and unemployment taxes, set up payroll software, collect a Form W-4 and Form I-9, report the new hire to your state and arrange workers' compensation where it's required. Then put the quarterly and year-end filing dates in your calendar.

Fillable PDF. Click a box to tick it and type in the notes, then save or print.

Before the first day 6 ITEMS

- [ ] Confirm the role is an employee, not a contractor
- [ ] Get an EIN if you don't have one
- [ ] Register for state unemployment tax
- [ ] Register for state income tax withholding, if your state has it
- [ ] Arrange workers' compensation insurance where required
- [ ] Choose payroll software (Gusto, ADP or similar)

On the first day 5 ITEMS

- [ ] Collect Form W-4 for federal withholding
- [ ] Collect the state withholding form, if your state has one
- [ ] Complete Form I-9 within three business days
- [ ] Set up direct deposit
- [ ] Hang the required federal and state labor posters

General information, not tax advice for your situation.

In the first weeks 4 ITEMS

- [ ] Report the new hire to your state (usually within 20 days)
- [ ] Run the first payroll and check the pay stub
- [ ] Deposit federal payroll taxes on your schedule
- [ ] Set up a personnel file for each employee

Every quarter and year 4 ITEMS

- [ ] File Form 941 each quarter
- [ ] File state unemployment wage reports each quarter
- [ ] File Form 940 and W-2s by January 31
- [ ] Review pay rates against minimum wage and overtime rules

Notes

Want payroll handled?

We set it up, run it and file the returns. Book a free 30-minute call at eminenttax.com/contact or call (972) 347-4590.

eminenttax.com

General information, not tax advice for your situation.