FREE CHECKLIST

New employee onboarding checklist

When you hire someone, get a signed offer letter, complete Form I-9 within three business days, collect a federal W-4 and any state withholding form, report the hire to your state, set them up in payroll and benefits, and walk them through your policies. This checklist puts every step in order for each new employee.

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

Before day one 4 ITEMS

- [ ] Send a written offer with pay, schedule and start date
- [ ] Confirm whether the job is exempt or non-exempt for overtime
- [ ] Order equipment, keys and accounts
- [ ] Schedule their first-week training

Paperwork on day one 6 ITEMS

- [ ] Form I-9, section 1 on or before the first day
- [ ] Form I-9, section 2 within three business days, with their documents
- [ ] Federal Form W-4
- [ ] State withholding form, if your state has one
- [ ] Direct deposit form with a voided check or bank letter
- [ ] Emergency contact details

Within days 5 ITEMS

- [ ] Report the new hire to your state (usually within 20 days)
- [ ] Add them to payroll with the right pay rate and pay schedule
- [ ] Enroll them in health insurance, retirement plan and other benefits
- [ ] Add them to your workers' compensation policy
- [ ] Run E-Verify if your state or contracts require it

General information, not tax advice for your situation.

Policies and training 4 ITEMS

- [ ] Give them the handbook and get a signed acknowledgment
- [ ] Explain timekeeping, breaks and overtime rules
- [ ] Cover safety training for the job
- [ ] Set goals for the first 30, 60 and 90 days

Records 3 ITEMS

- [ ] Store I-9s apart from the personnel file
- [ ] Keep the W-4 and payroll records at least four years
- [ ] Put a 90-day check-in on the calendar

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

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