NEW HIRE CHECKLIST

Employer Information

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| --- | --- |
| Employer Name: |  |
| Employee Address:  Employment Phone:  Employee Email: | Employer EIN set up?  Employer State Taxes set up?  Employer Locality Taxes set up?  Worker’s Comp Insurance Obtained?  Mandatory Labor Law Postings Posted? |

|  |  |
| --- | --- |
| Employee Information  (To input into HR system) | Job Information  Job Title:  Supervisor:  Job Description: |
| Employee Name:  Employee Phone:  Employee Email: | Offer Information  Offer letter sent?  Passed background check?  Successful drug screen?  Employment agreement signed? |
| Employee Home Address (include zip code): | Payroll Tax Information  W-4 Federal Tax Withholding Form complete?  W-4 State Tax Withholding Form complete?  Employee I-9 Form complete? |
| Create an Employee Personnel Folder (By last name or date of hire) | Send Employee information to State New Hire Reporting Agency (See SBA for list) |
| Gather new hire documents such as:   * employee handbook * policy documents for review or signature (i.e. NDA or Non-compete) * direct deposit form * employee benefits enrollment form * employee data sheet | Employee data sheet with emergency contact information completed?  Employee Direct deposit sign up form with voided check?  Employee benefits program overview and due date for sign up locations/ instructions)? |

Employee Onboarding

Employee File

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| --- | --- |
| Set up workspace with supplies such as computer, phone, desk, chair, office supplies | Provide login IDs for computer, software and applications |
| Set up time card or entrance badge | Meet supervisor, trainer and  co-workers |