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 InformationJob 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

|  |  |
| --- | --- |
| [ ] 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 andco-workers |