# **New Hire Checklist**

|  | **TASK** | **DATE** |
| --- | --- | --- |
| **✔** | **Employee Information** | MM/DD/YYYY |
|  | Employee data information sheet collected |  |
|  | Background check acquired and passed |  |
|  | Drug test acquired and passed |  |
|  | Offer letter signed |  |
|  | Employment agreement signed |  |
|  | Confidentiality agreement signed (e.g., NDA) |  |
|  | Employee data entered into HR, payroll, and/or benefits systems |  |
|  | I-9 work authorization complete |  |
|  | HR personnel file created |  |
| **✔** | **HR Personnel File Documentation** | MM/DD/YYYY |
|  | W4 federal tax withholding form complete |  |
|  | W4 state tax withholding form complete |  |
|  | State new hire reporting complete |  |
|  | Employee handbook signed |  |
|  | Policy documents reviewed and signed |  |
|  | Direct deposit form acquired |  |
|  | Employee benefits enrollment form signed |  |
| **✔** | **Pre-Onboarding Logistics & Other Tasks** | MM/DD/YYYY |
|  | Workspace set-up complete (e.g., computer, printer, desk, chair, phone, etc.) |  |
|  | Company ID, timecard, and/or entry card prepared |  |
|  | Logins for computer, software, and apps acquired |  |
|  | Meet-and-greet sessions with manager, supervisor, and co-workers scheduled |  |
|  | New employee orientation activities planned and scheduled |  |
|  | New hire training scheduled (e.g., harassment prevention training, role-specific learning sessions) |  |
|  | Welcome email with orientation schedule prepared and sent to new hire |  |
|  | Company-wide new employee announcement prepared and released |  |
|  | Welcome kit with company swag items prepared |  |
| **✔** | **New Employee Check-ins** | MM/DD/YYYY |
|  | 30-day check-in |  |
|  | 60-day check-in |  |
|  | 90-day check-in |  |