NEW HIRE CHECKLIST

Employee Name: **Hire Date:**

Position Title:

PRE-HIRE REQUIREMENTS

	Send and Receive Signed Offer Letter
	Send a Welcome E-Mail or Letter With the Following Information: • **Documents the employee must bring before and on their first day** • **An introduction to the team - help them feel like they belong** • **The employee's start date and information they need to know on their first day** • **Any other information about the company culture or expectations you want to include**
	Send and Request the Completion of New Hire Documents: • **I-9, which verifies the employee's ability to work legally in the US (Use E-Verify to check this information with the US Department of Homeland Security and Social Security Administration)** • **W-4, which reflects how much should be withheld from employee paychecks for federal income taxes** • **State and Local Tax Withholding Forms, which reflects how much should be withheld from employee paychecks for state and local income taxes** • **Employee handbook, if applicable** • **A form to indicate permission to conduct a background check and drug test (if applicable)** • **Direct deposit form, if you offer to pay employees this way** • **ACA Notice of Coverage Options**
	Complete Background Check and Drug Test, if applicable
	Ensure the Employee Has Any Necessary Supplies or Materials. Depending on Your State and Jurisdiction, There May be Postings or Communications You Need to Provide About Workplace Rights, Benefits, etc.
	Schedule and Hold Orientation Meeting and Answer Any Questions
	Report the New Hire to Your State and Local Juridiction, if applicable

FIRST TWO DAYS REQUIREMENTS

	Begin Training: • **Compliance training to stay legally compliant** • **Safety training to ensure the safety of the employee and the business** • **Job-specific training to ensure the employee is ready to perform his/her job duties**
	Review: • **Job Responsibilities as outlined in the job description** • **Expectations regarding employee performance and methods for evaluating employee performance** • **Any goals for the employee, could be tangible or intangible measures**
	Verify All New Hire Documents are Complete, Including Banking and Tax Information
	Issue Benefit Enrollment Forms
	Check-In with New Hire to Address Any Questions (Optionally, Host a Lunch for the New Hire)

AFTER FIRST TWO DAYS

	Ensure All New Hire Documents are Complete, Including Benefit Enrollment Forms
	Ensure All Necessary Training is Completed
	Review Any Policies or Procedures on an Ongoing Basis
	Conduct Performance Reviews and Be Encouraging!

IMPORTANT DATES

First Pay Day	
Benefits Effective Date	
Probationary End Date	