**New Hire Checklist**

**Employer Information**

Employer Name: Employer Address:

Employer Phone: Employer 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?

# Job Information

**Employer Information**

(To input into HR system)

Employer EIN set up? Employer State Taxes set up?

Employer Locality Taxes set up?

Employee Name: Employment 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?

# Employee File

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

Set up workspace with supplies such as computer, phone, desk, chair, ofﬁce supplies

Set up time card or entrance badge

Provide login IDs for computer, software and applications

Meet supervisor, trainer and co-workers