



# New Hire Onboarding Checklist

Hiring the successful applicant will involve a number of important tasks, steps and paperwork. See the summary below for key information.

1. Send the prospective employee an offer letter or contract and other documents, including confidentiality or non-compete agreements, if appropriate.
2. Be sure all documents are signed.
3. Prepare for the arrival of the new employee.
4. Conduct employee onboarding/new employee orientation.

## New Hire Forms - Government Requirements

The following are key steps and requirements involved in the new hire process:

- **Form I-9 Eligibility for Employment.** All U.S. employers must complete and retain a Form I-9 for each individual they hire for employment in the United States. This includes citizens and noncitizens.
- **New Hire Reporting.** You are required to report any new employee to a designated state new hire registry. Many states accept a copy of Form W-4 with employer information added.
- **Using Form W-4 to Calculate Withholding.** To know how much income tax to withhold from employees' wages, you should have a [Form W-4](#) on file for each employee. Ask all new employees to give you a signed Form W-4 when they start work, and make the form effective with the first wage payment. If a new employee does not give you a completed Form W-4, withhold tax as if he or she is single, with no withholding allowances. A Form W-4 remains in effect until the employee gives you a new one. Also have your new employee complete any tax forms required under state law.
- **Recording Employee's Name and Social Security Number.** Record each new employee's name and number from his or her social security card. Any employee without a social security card should apply for one. Do not accept an individual taxpayer identification number (ITIN) in place of an SSN for employee identification or for work. An ITIN is only available to resident and nonresident aliens who are not eligible for U.S. employment and need identification for other tax purposes. You can identify an ITIN because it is a 9-digit number, beginning with the number "9" with either a "7" or "8" as the fourth digit and is formatted like an SSN (for example, 9NN-7N-NNNN).

## New Hire Onboarding Checklist

Employee Name: \_\_\_\_\_ Date: \_\_\_\_\_

Job Title: \_\_\_\_\_

Department: \_\_\_\_\_ Supervisor: \_\_\_\_\_

### New Employee's Workspace & Other Essentials

- Show the new employee his/her office or work area.
- Be sure the employee's new workspace has all necessary equipment, including phone, PC or laptop, password access to the company's intranet or online data, pens, paper and any other materials necessary to efficiently function in the new job.
- Discuss how the company's staff is organized and who handles various important areas like employee benefits—this is especially important in a small company where one employee may handle a number of different responsibilities.
- Inform the new hire of his/her training schedule, if appropriate.

### Compensation and Benefits

Provide information on compensation and benefits in the following key areas:

- Information on the company's employee benefits package, which may include health insurance, vision, dental and retirement plans.
- Any additional compensation information, which may include the company's overtime policy, bonuses and any other financial incentives.

## Company Policies/Handbook

Make sure the employee has received a copy of your company's employee handbook. There should be a written and signed 'Acknowledgement of Receipt' stating that the employee has read and understands the handbook.

Be sure to explain the following policies:

- Hours of work and overtime procedures (if appropriate to the position)
- Lunch/break periods
- Smoking regulations
- Personal/business use of the phone, email, internet access, etc.
- Confidentiality requirements, if appropriate (or provide a confidentiality agreement in advance for review and signature)
- Safety guidelines and procedures for reporting injuries
- Schedule of performance reviews (i.e., once a year)
- Reimbursement of business-related expenses

## Time Off/Leave Policies

- Describe your company's paid time off, vacation, and/or sick leave policies.
- Provide a list of holidays when the company is closed.
- Explain the company's attendance/tardiness policy.
- Describe any applicable leaves of absence required by law, such as FMLA (review federal and state requirements).

## Employee Responsibilities

- Discuss job responsibilities with the new employee.
- Introduce the new employee to his/her team or department members.
- Discuss how the employee's position relates to the growth and success of the company and any interaction with other departments or employees.

## Office/Company Tour

Be sure to show the new employee important areas of the office, including:

- Fire exits
- Restrooms
- Parking facilities

**Be sure to check in with your new hire at least twice during the first 2 weeks on the job regarding any questions or needs.**

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Supervisor's Signature

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Date