

Employee Name: _____ Start Date: _____

Position Title: _____ Department: _____

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.)	

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	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	