Onboarding Checklist

Use this checklist to prepare for your new hire's first day. We've categorized the items into the things you need to do before the first day and things to do on the first day.

Things to Do Before the First Day

Know the Legal Requirements

Before anything else, make sure you understand new hire compliance. Here's the paperwork you need to know about:

☐ **Form I-9:** This federal form is required for all U.S. employers and is used to verify new hire work authorization. The Form I-9 needs to be filled out by the employee on day one. Part of the Form I-9 requires you as the employer to examine appropriate identification and complete an employer section no later than day three of employment. You can learn more about this important step at [I-9 Central](#).

☐ **Form W-4:** This is another federal form that an employee completes to inform the employer of the correct federal income tax to withhold from an employee's pay. This is best-taken care of on day one with a hard deadline to complete before the first payroll.

☐ **State-Specific Forms:** Many states have their own withholding forms to record the amount of state income tax to withhold from an employee's pay. Be sure to check your state requirements and prepare any necessary forms.

☐ **New Hire Reporting:** You'll need to let your state government know that you've made a new hire to stay compliant with the Personal Responsibility and Work Opportunity Reconciliation Act of 1996 (PRWORA). Where to send this info, the time frame, and any additional reporting requirements vary by state. Use [this guide](#) from the federal OCSE website. A [Multistate Employer Registry](#) is available, which allows an employer to report all of its new hires in any state where it has employees.

Create a Pre-First Day Checklist

This may vary depending on the company or the role, but an employee onboarding checklist may look something like this:

- ☐ **Set up internal logins:** Create login credentials to programs or software so they are ready to go when needed.

- ☐ **Order and set up equipment:** Prepare a computer, uniform, or other items ahead of time so you're not scrambling once they've started work.

- ☐ **Create a first-day schedule:** Plan what the new hire will be doing on the first day, from paperwork to lunch to a meet and greet with the team. You may want to create a detailed schedule for the entire first week or beyond.

- ☐ **Communicate with the new hire:** Reach out to your new hire ahead of their first day to reiterate your welcome and let them know what to bring, what time to arrive, and any other logistical details (dress code, parking, whether they should bring lunch).

- ☐ **Communicate with your team:** Make sure your current team knows who's starting and when. Encourage employees to greet the new hire.

Things to Do on the First Day

Create another onboarding checklist for you (as the employer) to complete during the first day. Here are a few things you may want to include:

- ☐ Provide your new hire with a first-day schedule so they know what to expect
- ☐ Complete required paperwork
- ☐ Set employee up in payroll
- ☐ Share benefits information
- ☐ Give an office/facility tour
- ☐ Introduce to team
- ☐ Review company mission, values, and goals
- ☐ Cover expectations and logistics
- ☐ Review training plan