



# New Employee Hire Checklist



## 1. Before the Offer

- ☐ Review and confirm headcount approval or budget
  - ☐ Finalize job description and internal title
  - ☐ Conduct and document interview evaluations
  - ☐ Confirm candidate's eligibility to work (visa status, remote work location)
  - ☐ Run background check (if applicable and with proper authorization)
  - ☐ Conduct reference checks
- 



## 2. Offer & Acceptance

- ☐ Draft offer letter with:
    - ☐ Job title and reporting line
    - ☐ Start date
    - ☐ Compensation details (base, bonus, equity, etc.)
    - ☐ Employment classification (exempt/non-exempt, full-time/part-time)
    - ☐ At-will employment disclaimer
  - ☐ Include applicable legal documents:
    - ☐ Confidentiality and IP Assignment Agreement
    - ☐ Arbitration Agreement (if used)
    - ☐ Background check disclosure and consent (if not already done)
  - ☐ Send and collect signed offer and related documents
  - ☐ Notify internal teams (HR, IT, payroll, manager) of new hire
- 



## 3. Pre-Day One Preparation

- ☐ Create or update employee record in HRIS / employee database
- ☐ Add employee to payroll system and benefits enrollment (if applicable)
- ☐ Set up:
  - ☐ Company email
  - ☐ Slack / Teams / internal tools
- ☐ Order laptop, equipment, and security credentials
- ☐ Prepare welcome email and day-one agenda
- ☐ Assign onboarding buddy or mentor (optional)



---

## 4. Day One Onboarding

- ☐ Welcome call or orientation with HR or manager
  - ☐ Review and sign:
    - ☐ I-9 Form (within 3 days of start date)
    - ☐ W-4 (for payroll/tax)
    - ☐ Direct deposit form
  - ☐ Distribute:
    - ☐ Employee Handbook (with acknowledgment receipt)
    - ☐ Code of Conduct
    - ☐ Workplace policies (e.g., anti-harassment, expense reimbursement, remote work policy)
  - ☐ Conduct office tour or virtual tech walkthrough
  - ☐ Schedule meetings with team, manager, and stakeholders
- 

## 5. First Week Setup

- ☐ Assign first training modules or onboarding tasks
  - ☐ Ensure completion of compliance and security trainings
  - ☐ Introduce performance expectations and review process
  - ☐ Confirm benefits enrollment access and deadlines
  - ☐ Review key documents and systems (e.g., time tracking, PTO request process)
- 

## 6. Post-Onboarding (30/60/90 Days)

- ☐ Schedule check-ins at 30, 60, and 90 days
  - ☐ Solicit feedback on onboarding experience
  - ☐ Confirm goals and KPIs have been shared and documented
  - ☐ Ensure all forms and training are complete and stored
  - ☐ Update employee status in HRIS (probation complete, benefits confirmed, etc.)
- 

## Special Notes for Compliance

- California employers must provide written notices (Wage Theft Prevention Notice for non-exempt workers, Harassment Prevention Training, Paid Sick Leave rights)
- Remote hires must still complete I-9 verification—consider using authorized agents
- If offering stock or options, ensure timely delivery of grant documentation and equity agreements