**Hire Checklist Sample**

**Employee Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Employee Identification Number (if applicable): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

|  |  |
| --- | --- |
| **Action** | **Date** |
| Offer letter sent. |  |
| Offer accepted. |  |
| Background check started (if applicable). |  |
| Background check completed (if applicable). |  |
| Physical/drug screen completed (if applicable). |  |
| Prepare workspace (office/production/remote). |  |
| Order equipment (computer, phone, tools). |  |
| Prepare internal/external announcements. |  |
| Start employee personnel file and place current documents in the file. |  |
| Confirm employee start date. |  |
| Post internal/external announcement. |  |
| Update organizational chart if required. |  |
| Prepare onboarding paperwork. |  |
| Create a new employee first-day folder. |  |
| Place all onboarding paperwork in a folder for the first day along with any welcome gifts (e.g., coffee mug, pen, water bottle, etc.). |  |

**Employee Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

**Employee Identification Number (if applicable): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

1. Prepare New Hire Paperwork for Payroll and Human Resources. **▢**
   1. Form W-4, Employee Withholding Certificate (federal income tax) **▢**
   2. Form IT-2104, Employee Withholding Allowance Certificate (New York State tax) **▢**
   3. Wage Theft Prevention Act notice **▢**
   4. I-9 Employment Eligibility Verification form **▢**
   5. Employee Data Form with emergency contact information **▢**
   6. Form LS15, Notice and Consent for Direct Deposit New York and blank check **▢**
   7. Current position description **▢**
   8. Benefit summaries and enrollment forms (if applicable) **▢**
2. Arrange for security pass/key preparation. **▢**
3. Arrange for IT accesses and passwords. **▢**
4. Prepare any welcome gifts (e.g., t-shirts, mugs, recycle bag, coffee mug). **▢**
5. Create a personnel file and, if applicable, a separate supervisory/location file. **▢**
6. Create a separate file for medical documentation. **▢**
7. Assign an ambassador to assist with training and welcome

Name of ambassador: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **▢**

1. Confirm equipment is ready (e.g., computer, phone, tool(s), uniform, etc.).
2. Confirm workspace is ready, clean, and stocked **▢**
3. Begin orientation schedule and welcome **▢**