

# New Employee Checklist A checklist for HR & Managers

## Paperwork

- Offer letter/contract
- Tax Documents
  - Form W-4*
  - Form I-9*
- Benefits
  - Health, life, & disability insurance*
  - Retirement plans*
- Employee handbook acknowledgment
- Collect personal information
  - Copy of ID*
  - Home Address*
  - Phone Number*
  - Emergency Contact*
  - Allergies*

## Payroll

- Direct deposit enrollment
- Vacation and PTO requests

## Employee Policies

- Company phone policy
- Company email policy
- Dress code
- Remote work

## Paperwork

- Computer
  - New hire's email account*
  - Communication channels (e.g. Slack)*
  - Other software logins and credentials*
- Phone
- ID badge
- Keys
- Furniture *(e.g. Locker, desk, chair)*

## Company Basics

- Take a tour of the office
- Review job expectations & responsibilities
- Discuss interpersonal dynamics
- Welcome sign or card at work station
- Establish a mentor
- Casual daily check-ins
- Schedule lunch for the first day