New Hire Paperwork Checklist

Use one copy per new employee. Initial and date each item when it is complete. Items marked (state) depend on the work location; check your state labor department's list before first use.

EMPLOYEE AND POSITION DETAILS

Employee legal name

Job title

Work location (city, state)

Start date

Employment type

☐ Full-time ☐ Part-time ☐ Temporary / seasonal ☐ Intern

FLSA status

☐ Exempt ☐ Non-exempt

Hiring manager

HR owner for this file

BEFORE THE FIRST DAY

- ☐ Signed offer letter received and filed
- ☐ Background check disclosure and authorization signed (standalone document) and results cleared, if applicable
- ☐ Drug test consent signed and result received, if applicable
- ☐ Signed confidentiality, invention assignment or arbitration agreement, if used
- ☐ New hire information form sent with a return date before day one
- ☐ Emergency contact form sent
- ☐ Form I-9 Section 1 link or paper copy sent, with the list of acceptable documents
- ☐ Federal Form W-4 sent
- ☐ State withholding certificate sent (state)
- ☐ Direct deposit authorization form sent with instructions for a voided check or bank letter
- ☐ State wage notice or pay rate notice prepared (state)
- ☐ Employee handbook and handbook acknowledgment form sent

ON OR BEFORE DAY ONE

- [ ] Form I-9 Section 1 completed and signed by the employee no later than the first day of work
- [ ] Form W-4 completed and entered in payroll
- [ ] State withholding form completed and entered in payroll (state)
- [ ] Direct deposit form completed and banking details verified
- [ ] New hire information form and emergency contact form returned and checked for blanks
- [ ] Handbook acknowledgment signed
- [ ] Required policy acknowledgments signed (anti-harassment, code of conduct, acceptable use, timekeeping)
- [ ] State wage notice signed by the employee (state)
- [ ] Workers' compensation notice provided or posted (state)
- [ ] Voluntary EEO self-identification form offered, kept separate from the personnel file, if collected

WITHIN THE FIRST THREE BUSINESS DAYS

- [ ] Form I-9 Section 2 completed: documents physically examined (or remote alternative procedure used, if eligible) and signed by the employer representative
- [ ] E-Verify case created, if the employer participates or is required to by contract or state law
- [ ] I-9 filed in the separate I-9 file, not in the personnel file

WITHIN THE FIRST 20 DAYS TO 90 DAYS

- [ ] New hire report submitted to the state directory of new hires (federal deadline 20 days from hire; some states require it sooner)
- [ ] Health Insurance Marketplace notice provided (within 14 days of start date)
- [ ] Benefits enrollment forms completed or waiver signed before the enrollment window closes
- [ ] Beneficiary designation forms completed for life insurance and retirement plans
- [ ] COBRA general notice provided within 90 days after group health coverage begins
- [ ] 401(k) or retirement plan enrollment or automatic enrollment notice provided
- [ ] State-specific pamphlets and notices delivered, such as paid sick leave or disability insurance notices (state)

FILE CHECK AND SIGN-OFF

- [ ] All items above complete or marked N/A
- [ ] Medical and benefits documents stored in a separate confidential file

Notes on missing or late items

Completed by (HR)

HR signature

Date

Date