Pre-Employment Checklist

Use one checklist per new hire. Assign an owner to each section (recruiter, HR, hiring manager, IT, facilities). Target timeline assumes a start date two weeks after offer acceptance; compress or extend as needed. New hire: [Name] | Position: [Job Title] | Location: [Site] | Start date: [Date] | Recruiter: [Name] | Hiring manager: [Name]

1. OFFER AND ACCEPTANCE (DAY 0 TO 1) | OWNER: RECRUITER

- [ ] Offer approved at the right level (pay within range or exception signed)
- [ ] Offer letter or conditional offer letter sent, listing all contingencies
- [ ] Signed offer received and saved to the candidate record
- [ ] Start date, shift and reporting location confirmed in writing
- [ ] Requisition status updated; other finalists notified once acceptance is confirmed
- [ ] Hiring manager and HR notified of acceptance and start date

2. CONTINGENCIES AND SCREENING (DAY 1 TO 7) | OWNER: RECRUITER / HR

- [ ] Background check disclosure, authorization and state notices sent and signed
- [ ] Background check ordered with the package defined for this role
- [ ] Drug screen scheduled, if required for the role and permitted in the state; collection site and deadline sent to the candidate
- [ ] Professional license or certification verified with the issuing body (record license number and expiration date)
- [ ] Driving record ordered, if the role requires driving
- [ ] References completed, if a condition of the offer
- [ ] Healthcare roles: exclusion and sanctions lists checked, immunization and TB documentation requested
- [ ] Results reviewed; any potential adverse finding sent through the pre-adverse action process before a decision
- [ ] All contingencies cleared and written clearance sent to the hiring manager

3. NEW HIRE PAPERWORK (BEFORE OR ON DAY 1) | OWNER: HR

- [ ] Form I-9 Section 1 completed by the employee no later than the first day of work
- [ ] Form I-9 Section 2 documents examined no later than the third business day after the start date
- [ ] E-Verify case created within three business days of start, if the employer participates
- [ ] Federal Form W-4 completed
- [ ] State and local withholding forms completed, where applicable
- [ ] Direct deposit authorization and bank details collected
- [ ] Emergency contact form completed
- [ ] Voluntary self-identification forms offered (federal contractors), kept separate from the personnel file
- [ ] Required state notices provided (for example, wage notice or pay rate acknowledgment where required)

- [ ] Signed employment agreement, NDA or IP assignment, if used for this role
- [ ] Handbook and policy acknowledgments sent for signature

4. PAYROLL AND HR SYSTEMS (DAY 3 TO 10) | OWNER: HR / PAYROLL

- [ ] Employee record created in HRIS with correct job code, department, manager and FLSA status
- [ ] Pay rate, pay frequency and any shift differential set up in payroll
- [ ] Timekeeping profile and schedule created for non-exempt employees
- [ ] Benefits eligibility date calculated and enrollment information scheduled
- [ ] State new hire report filed (federal law requires reporting within 20 days of hire; some states require sooner)
- [ ] Workers' compensation class code confirmed

5. EQUIPMENT, ACCESS AND WORKSPACE (DAY 5 TO 12) | OWNER: HIRING MANAGER / IT / FACILITIES

- [ ] Laptop, phone, headset or other equipment ordered and assigned
- [ ] Email, network and application accounts requested with the correct access level
- [ ] Badge, keys or building access arranged
- [ ] Uniform, safety gear or PPE sized and ordered
- [ ] Workstation or locker assigned
- [ ] Remote hires: equipment shipped with tracking and delivery confirmed at least 2 business days before start

6. DAY-ONE READINESS (DAY 10 TO 14) | OWNER: HIRING MANAGER / RECRUITER

- [ ] Welcome message sent with start time, address, parking, dress code, who to ask for and what to bring (including I-9 documents)
- [ ] First-week schedule prepared, including orientation and training sessions
- [ ] Buddy or peer mentor assigned and introduced
- [ ] Team told about the new hire's start date and role
- [ ] Check-in call or text with the new hire 2 to 3 days before start
- [ ] Onboarding checklist opened for the first 90 days

SIGN-OFF

All contingencies cleared on

Paperwork complete on

Ready for day one (hiring manager)

Date

HR verification

Date

Notes or open items