**NEW HIRE CHECKLIST TEMPLATE**

**EMPLOYMENT PAPERWORK TO COMPLETE BEFORE**

* Prepare an employment contract and receive signed, if applicable. This contract is usually written as a detailed job offer that includes:
* Job information (job title, department)
* Work schedule
* Length of employment
* Compensation and benefits
* Employee responsibilities
* Non-disclosure agreement
* Non-compete agreement
* Time off policy
* Termination conditions
* Send an offer letter. This is a document (often an email) that spells out the basics of the relationship between employer and employee. In your job offer letter or email, include:
* Job title
* Department
* Name and position of direct report
* Work schedule
* Start date
* Compensation
* Benefits (brief mention)
* Length of employment
* Date by which candidate needs to respond to your offer

*You could also attach the employment contract, where you describe terms of employment in detail.*

* Complete employment forms required by your country or state law. The most common types of forms new hires fill out are:
* W-4 form
* I-9 form
* State tax withholding form
* Employee invention agreement form
* Direct deposit form
* Benefits forms (e.g. health insurance agreement)
* **Tasks to do before a new hire’s first day**
* Ask new hires to send you:
* Personal data to enter into company HRIS (e.g. ID or passport number, contact details, SSN, tax identification number)
* Bank account information, if you’re using direct deposit to pay employees
* Copies of certificates and diplomas that are necessary to perform the job (e.g., for nursing or accounting positions)
* Any food allergies or preferences they may have (e.g., vegetarian or gluten-free)
* Send new hires a welcome email that includes:
* Arrival time on their first day
* A copy of your office map
* A rundown of the dress code, if you have one
* A first day or first-week agenda
* Invite new hires to join corporate accounts, including:
* Email
* Messaging software (e.g. Slack)
* HRIS
* Productivity tools (e.g. Trello, ToDoist)
* Password security (e.g. LastPass)
* Send a new hire announcement email to all employees to make sure they give a warm welcome to their new colleague.
* Remind new hire’s manager to send a chat message announcing the new employee on their start date (e.g. on Slack, Workplace.) Make sure to mention:
* New hire’s name and job title
* Department/team they’ll be joining
* A few things about their professional or academic background
* Welcome events you may have organized (e.g. an after-work dinner)
* Send a reminder to hiring managers to make sure they prepare new employee’s first-day tasks.
* Send new hire’s data to your:
  + The accounting department, so that they add new employee to payroll
  + IT team, so that they can help them set up accounts for corporate software
  + Office Manager, so that they can set up their workstation
* Prepare your new hire’s tech, including:
  + Laptop.
  + Monitor.
  + Phone.
  + Mouse.
  + Keyboard.
  + Headset.
* Arrange for new hire’s ID card, building access fob, and personal locker.
* Order new employee’s business cards and/or nameplates.
* Ask for a new hire’s T-shirt size and place an order for a work uniform and/or a company T-shirt as a welcome gift.
* Prepare and send an onboarding kit. Here’s what you could include:
* Employee handbook
* A welcome letter from their manager or CEO
* Computer setup instructions
* Stationery (e.g. notebook, pens, stickers)
* A company t-shirt
* A company mug
* A copy of your organizational chart
* A copy of a book relevant to your company or its culture
* A guide of local points of interest (e.g. nearby cafes and restaurants)
* Prepare a tentative first day and first-week agenda that covers:
* A company overview, including mission, teams, and policies
* 1:1 meeting with the manager and team members
* Completing the HR paperwork
* Role-specific training
* Product-related demos
* Team-building activities (e.g., a group lunch)
* Assign a buddy to help new hire through first few weeks or months in the role.