

## Company Name/Logo

### New Hire Checklist

Name

Start Date

#### Pre Offer Confirmations

Group/Activity (order may vary by position)	Who is responsible	Done
Management Approval to Fill Position	CEO or CFO	<input type="checkbox"/>
Hiring Manager Confidence in the Individual	Manager	<input type="checkbox"/>
Peer/Team Informed and/or Will Accept New Person	Manager	<input type="checkbox"/>
Background and/or Reference Checks	HR	<input type="checkbox"/>
Other		<input type="checkbox"/>

#### Offer Packet

Document	Who is responsible	Date given	Received Back
Offer Letter (keep a copy for file)	Manager		copy <input type="checkbox"/>
Sales Agreement or Other Contract (if applicable)			<input type="checkbox"/>
Options or Other Special Compensation (if applicable)			<input type="checkbox"/>
Offer Acknowledgements & Contingencies	HR		<input type="checkbox"/>
IP, Confidentiality & Non-Compete Agreement			<input type="checkbox"/>
Benefits Overview of Coverage and Cost			N/A
Employee Handbook & Acknowledgement			EeAcknwlg <input type="checkbox"/>
			<input type="checkbox"/>

#### Offer Acceptance Packet (can be combined with above)

Document/Action	Who is responsible	Date given	Received Back
I-9 Employment Eligibility	HR		<input type="checkbox"/>
Federal W-4			<input type="checkbox"/>
State W-4			<input type="checkbox"/>
Local Tax W-4, if applicable			<input type="checkbox"/>
Medical Plan Elections or Waiver of Coverage			<input type="checkbox"/>
Enrollment Forms for each carrier			<input type="checkbox"/>
Direct Deposit Enrollment			<input type="checkbox"/>
Payroll Self-Service Login Instructions			N/A
			<input type="checkbox"/>

#### Post Acceptance

Document	Who is responsible	Done
Payroll, intial setup	HR	<input type="checkbox"/>
Insurance plan enrollments with each carrier		<input type="checkbox"/>
Update Payroll with wages, deductions, etc.		<input type="checkbox"/>
Confirm all documents are e- or paper filed		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>