New hire checklist template: Before the first day | Workable

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](https://resources.workable.com/job-offer-email-template). 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](https://www.bls.gov/jobs/statetax.htm)
  + 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 number, 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](https://resources.workable.com/new-employee-welcome-email-template) 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](https://resources.workable.com/new-employee-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:
  + 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 name plates.
* Ask for 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](https://resources.workable.com/employee-handbook-policies)
  + 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 meetings with manager and team members
  + Completing HR paperwork
  + Role-specific trainings
  + 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.