

(Name of Organization)

NEW HIRE CHECKLIST TEMPLATE
EMPLOYMENT PAPERWORK TO COMPLETE
BEFORE

➤ **Prepare an employment contract** and receive it 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

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- 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 the 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:

- ESIC
- Provident Fund
- 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)

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- 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 colleagues.

- Remind the 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 employees' first-day tasks.

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- Send new hire's data to your:
 - The accounting department, so that they add a new employee to the 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 employees' 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)

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- 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 hires through the first few weeks or months in the role.