

New Employee Orientation Checklist



New Employee Name: _____

On a new employee's first day, it's easy to miss a step with numerous forms to complete and notices to read through. This checklist aims to make that process a little easier. Please note only federal requirements are listed, your state may have further requirements. **This checklist is interactive!** Add company and state-specific forms in the provided fields, check off each item as you go, and click the info bubbles for tips to get you through the process.

Forms Completed by Employee

Form W-4

Make sure to share this information with your payroll representative.

Form I-9

Remember, once the employee has completed section one, you or a designated company representative will be required to complete section two. Retain the completed I-9 in a separate I-9 file or binder.

State Withholding Form (if applicable)

Make sure to share this information with your payroll representative.

Other

Other

Notices Provided to Employee

CHIP Notice

Notice of Exchange and Subsidies

There are two versions: one for employers who offer health insurance, and one for employers who do not. Make sure to use the appropriate version.

Other

Other

Benefit Forms (if applicable)

Initial Notice of COBRA Rights

Only required for employees who will be covered under your health plan, and only if you have 20 or more employees. If you work with a third-party administrator, this may be completed on your behalf.

401(K) and Other Benefit Info

Health Benefits Forms

Other

Other

Forms Completed by Employer

State New Hire Reporting

This typically needs to be completed within 20 days of hire, and is often completed by payroll.

Other

Other

Recommended Forms

These forms aren't required by law but are recommended to protect your business and start your new employee off on the right foot. Some organizations require employees to sign additional forms and agreements as a condition of employment. Examples include confidentiality, retention and non-competition agreements. These are often legally binding and must be drafted or reviewed by an attorney.

Emergency Contact Information

Offer Letter

Job Description

Retain signed copies of the offer letter and the job description in the employee's file.

At-Will Policy

This can be provided as part of your employee handbook but should be relayed in some format.

Employee Handbook & Acknowledgment

Direct Deposit Form (if applicable)

Other

Other

Items Loaned

Key(s)

Login Credentials

Laptop Computer

Other

Other