FREE PRINTABLE CHECKLIST · LINKUN FOUNDATION

First employee onboarding checklist

Everything to set up before and during a new employee's first week, from payroll registration to the first check-in.

Use this with the Hiring Toolkit. Rules vary by state and city; confirm with your payroll provider or a free SBDC advisor.

Before you make the offer

- [ ] Get an Employer Identification Number (EIN) from the IRS.
- [ ] Register with your state for payroll taxes (in California, the EDD).
- [ ] Get workers' compensation insurance.
- [ ] Choose a payroll provider or payroll software.
- [ ] Confirm the minimum wage for your city and state.

Before day one

- [ ] Send a written offer letter with title, pay, schedule, start date, and who they report to.
- [ ] Prepare the job description and a list of first-week tasks.
- [ ] Set up their logins, tools, keys, and uniform if needed.
- [ ] Put required federal and state labor law posters up.

Day one

- [ ] Collect Form W-4 (and your state's withholding form if it has one).
- [ ] Complete Form I-9: the employee fills in Section 1 on their first day, and you review their documents and complete Section 2 within 3 business days.
- [ ] Give them your workplace policies: hours, breaks, paid sick leave, safety, and how to raise concerns.
- [ ] Introduce them to the team and walk through a normal day.

First week

- [ ] Report the new hire to your state within 20 days (California: Form DE 34).
- [ ] Add them to payroll and confirm their pay schedule.
- [ ] Hold a check-in at the end of week one: what's going well, what's confusing.
- [ ] Set three goals for their first 90 days.

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