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2024 new hire onboarding checklist

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If you plan on hiring for your small business, you need an onboarding checklist. Without one, you run the risk of forgetting to file essential paperwork — and in turn, violating employment laws. Even if you trust yourself to get all of the essential documents signed and submitted with the right agencies, failing to create an onboarding checklist could leave your new hire confused about their responsibilities and unprepared to take on their role.



and don'ts of each part of the onboarding process and pick up some tips from HR professionals.

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What is onboarding?

Onboarding is an HR term that refers to the process of integrating a new hire into the workplace. Onboarding starts when a candidate accepts an offer. Depending on the industry, organization and role, the onboarding process can take just a few weeks or up to a year.

There are many activities and tasks associated with the onboarding process, from completing essential paperwork and making benefit elections to meeting the team and receiving on-the-job training.

Why is onboarding important?

onboarding process can:

- **Boost new hire retention:** Hacking HR reports that a well-structured onboarding procedure can significantly boost the likelihood of new employees staying with the company, with an increase of 82% in retention rates. This is particularly significant considering that 31% of new hires pack up within the first six months, with 16% leaving within the first week.
- **Improve employee productivity:** Hacking HR also found that an effective onboarding process can improve productivity by over 70%. When an onboarding process is done right, employees understand the expectations associated with their role and are equipped to do their jobs more efficiently.
- **Protect your business from the consequences of non-compliance:** The most important reason to have a strong onboarding process is that it helps you maintain compliance with employment laws. For instance, failing to comply with I-9 employment verification requirements is considered a civil violation in the US. Experian estimates that civil fines for I-9 paperwork violations range between \$281 to \$2,789 per violation — plus, fine amounts increase with each repeated violation, which can negatively impact your bottom line.

Related: [HR compliance: The ultimate guide](#)

Essential onboarding documents and paperwork

While paperwork isn't the most exciting part of bringing on a new hire, it is an essential step in the onboarding process.

In the US, certain forms are required to verify the identity and employment authorization of individuals — let's talk about those and other documents to share with your new hire after they sign their offer letter.

- **Form I-9** is required by the USCIS (the Department of Homeland Security's US Citizenship and Immigration Services). Both employers and employees must complete this form, and employees must provide evidence of their identity and employment authorization — usually in the form of a passport, driver's license or permanent resident card. You can see the full list of acceptable identification authorization documents on [USCIS' website](#).



pay.

Related (but not required during onboarding), a W-2 is an IRS tax form used to report an employee's wages and withholdings. Employers must file a W-2 for each individual they employ by January 31st of each year.

Learn more: [W-2 vs. W-4: Key differences](#)

- **Form W-9:** If you employ contractors, you'll need to issue them a Form W-9 (also known as a Request for Taxpayer Identification Number and Certification). This is an IRS tax form that employers use to get TINs from self-employed individuals and independent contractors.

Similar to the W-4/W-2 situation, employers who pay independent contractors more than \$600 throughout the year will also have to file a form 1099-NEC by January 31st each year to report non-employee compensation.

- **New hire reporting:** According to federal law, employers must report basic information about employees within 20 days of their hire date (note: exact requirements vary by state). This information is stored in the National Directory of New Hires, which is used to locate parents who owe child support.

The Personal Responsibility and Work Opportunity Reconciliation Act of 1996 (PRWORA) requires seven elements in new hire reporting:

1. Employee's name
2. Employee's address
3. Social Security number (SSN)
4. Date of hire (the date the employee first performs services for pay)
5. Employer's name
6. Employer's address
7. Federal Employer Identification number (FEIN)

- **State tax forms:** Not all states withhold income taxes — seven states levy no individual income taxes at all. However, if your business operates in one of the 43 states that do levy income taxes or taxes on wages and salaries, you'll need to complete a state tax withholding form (sometimes called a state W-4).

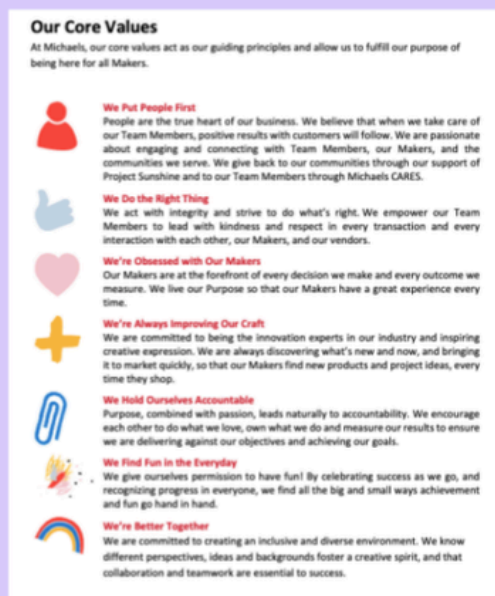


form is used to confirm their consent to be paid electronically and capture their bank account information.

- **Benefits explanation package:** A benefits explanation package helps educate new hires about the benefits your organization offers. It can be a print or digital document, but it should list all of the programs and policies available for employees to take part in. In addition to informational materials, you should also provide **employee benefits enrollment forms** or instructions for enrolling in plans online.

You might like: [3 types of employee benefits to consider](#)

- **Employee handbook:** An employee handbook is used to introduce your new hire to your company culture and workplace policies. Examples of what's typically found in an employee handbook include your mission and vision statements, an Equal Employment Opportunity Commission (EEOC) statement and an employee code of conduct. The latter usually covers things like dress code, alcohol/drug policy and technology usage. If you want to forego creating a benefits explanation package, you can also add that information to your employee handbook.



Michaels' employee handbook

paperwork requirements. For example, the Bureau of Labor Statistics (BLS) requires new hires to complete an Employee Address Form.

Onboarding documents: do's and don'ts

Do	Don't
Take advantage of payroll software tools that generate new hire forms and allow for e-signatures	Forget to provide contact information for your organization's HR team or onboarding specialist
Research reporting requirements for your state and industry	Skip running a background check on your new hire — you can use a tool such as Checkr to do this
Send documents to your new hire ahead of their first day (usually a week prior) with clear instructions for completion	

Pre-onboarding checklist

HR teams use pre-onboarding checklists to make sure that new hires have everything they need to get started on day one. Consider adding these three tasks to your pre-onboarding checklist.

1. Send a welcome email

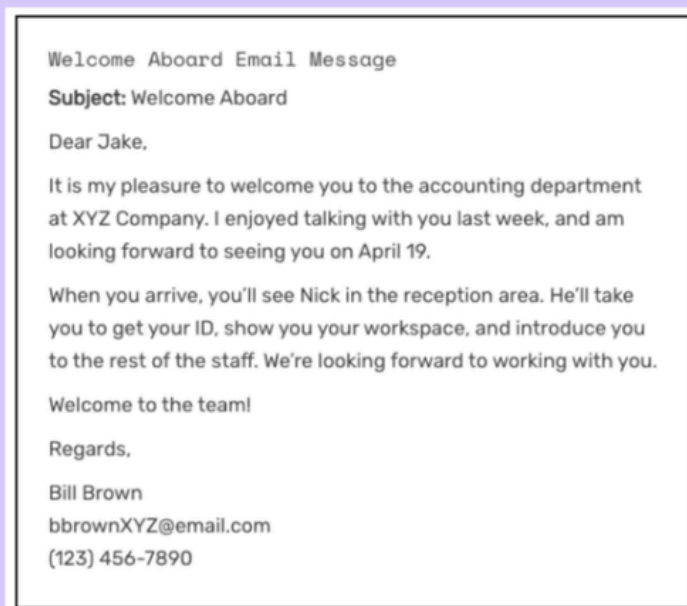
Welcome emails are typically sent after a candidate has accepted their offer letter but before their first day. They serve several purposes: to express appreciation and excitement for the candidate, explain the next steps in the onboarding process and share any must-know information about your company.

What to include in a welcome email:



- The date, schedule, location and dress code for the new hire's first day on the job
- A list of documents they will need to bring with them (such as a government-issued ID for I-9 completion)
- An introduction to their manager and team members with relevant contact information
- Additional paperwork or documents they'll need to complete before their first day

Editor's tip: Many HR and [payroll software](#) systems come with a library of templates for various HR documents, including offer letters and welcome emails. For example, [Gusto](#) provides offer letter templates and an onboarding checklist to help new-hire admin work with all of its plans. Learn how much you can expect to pay for this convenience in our [payroll services cost guide](#).



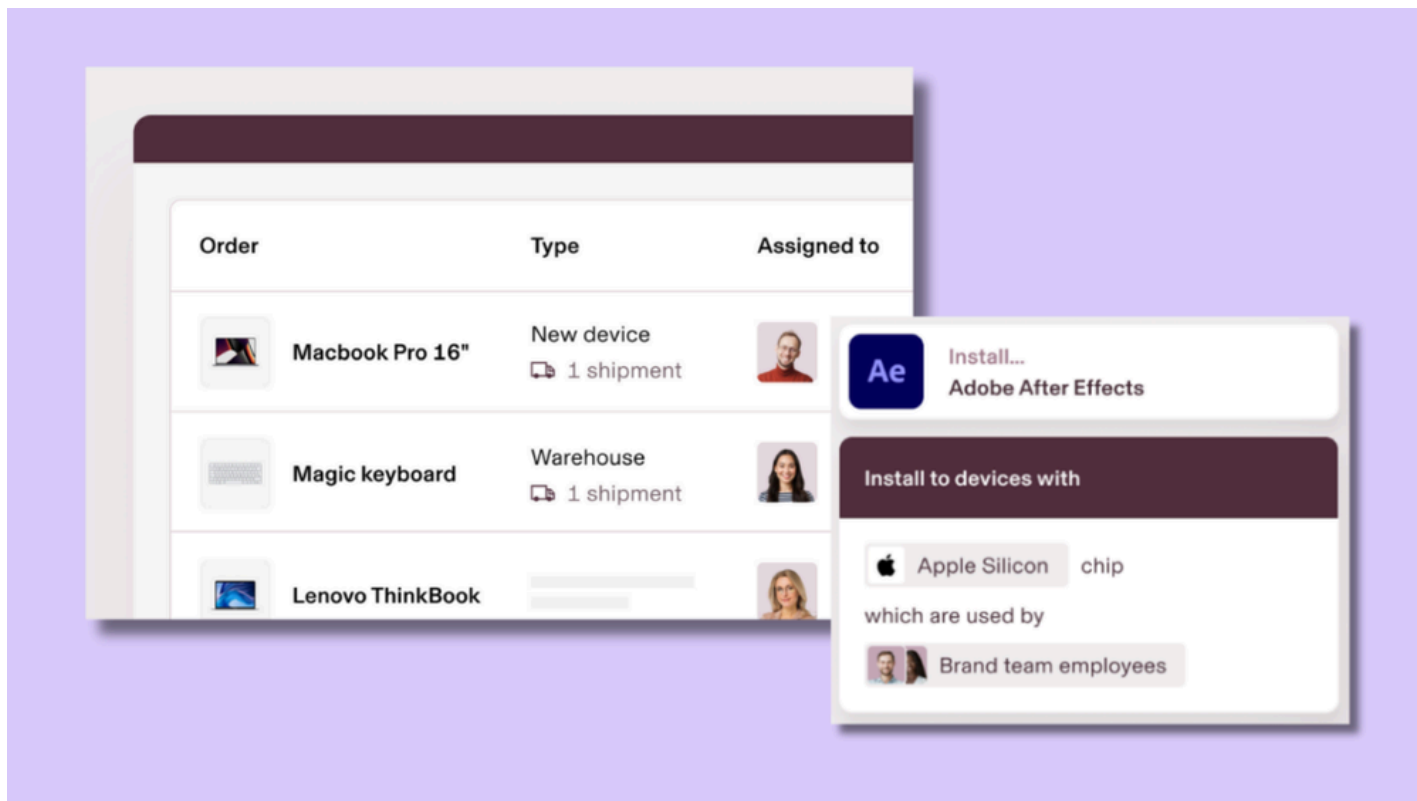
A sample welcome email from LiveAbout

2. Deliver equipment and set up relevant accounts

In many cases, you'll need to deliver a laptop or work phone to your new hire ahead of their first day. You'll also need to provide access and/or set up

(such as [email](#), collaboration software, [project management tools](#) and more).

Editor's tip: Device management software can help your business track who's using what, and some providers in the HR software space include such functionality in their tools. Rippling, a payroll and human capital management platform, offers this feature.



Examples of Rippling's device management feature

3. Schedule orientation and training sessions

The final task on your pre-onboarding checklist should be to get any initial orientation and training sessions scheduled for the new hire's first few weeks on the job. Doing this ahead of time ensures that your new hire knows what to expect as they settle in, and it will also help their team prepare any training materials needed to get them up to speed.

First-week onboarding checklist

caught up with [Annamry Mercedes](#), principal consultant for career and workplace consulting agency Revamped.

Mercedes listed a range of activities that should take place during a new hire's first week, including:

- **Welcome meeting:** On your new hire's first day, introduce them to their team, manager and company leaders. This is also the time to relay high-level information about the business — for example, you might want to touch on core values or unique aspects of your company's culture.
- **Company orientation:** Orientation meetings are generally led by a member of the HR team as their purpose is to share information about company policies and available resources (such as benefits, perks and programs). "It's an opportunity to go over important details that new hires need to know to navigate their new environment effectively," Mercedes says.



SHRM's new hire orientation template

- **Role-specific training:** Even if your new hire has the skills and experience needed to get to work right away, you should provide role-specific training to familiarize them with the workflows and platforms they'll be using every week. "This might include



- **IT orientation:** Even if you've provided access to all the essential apps and systems ahead of time, your new hire may have questions about how they work. Regardless, it's a good idea to introduce them to your IT staff so that they know how to reach out for support in the future.

While not a must-do, you can also schedule a **team lunch** or **coffee break** for your new hire. "It's a great way to build relationships and make new hires feel like part of the team right from the start," Mercedes points out. Intentionally carving out time to get to know and bond with new team members can go a long way when it comes to social integration in your workplace.

First-week onboarding: do's and don'ts

Do	Don't
Balance training and educational sessions with more informal, social meetings	Schedule too many meetings, as this can overwhelm the new hire and inundate them with too much information at once "A more gradual approach helps them absorb information without feeling rushed or overloaded," Mercedes says
Assign a mentor or onboarding partner to new hires	Forget to introduce your new hire to leaders within the company "A new hire once asked about an individual who turned out to be the COO! We quickly adjusted our onboarding process to include introductions to the C-suite during the initial days to avoid such confusion," says Angela Tait, founder of talent strategy agency Tait Consulting



In the [human resources](#) industry, 30-60-90 day onboarding plans are standard. This approach breaks the onboarding process down by month, with milestones at the 30-, 60- and 90-day marks to keep both the employer and employee on track.

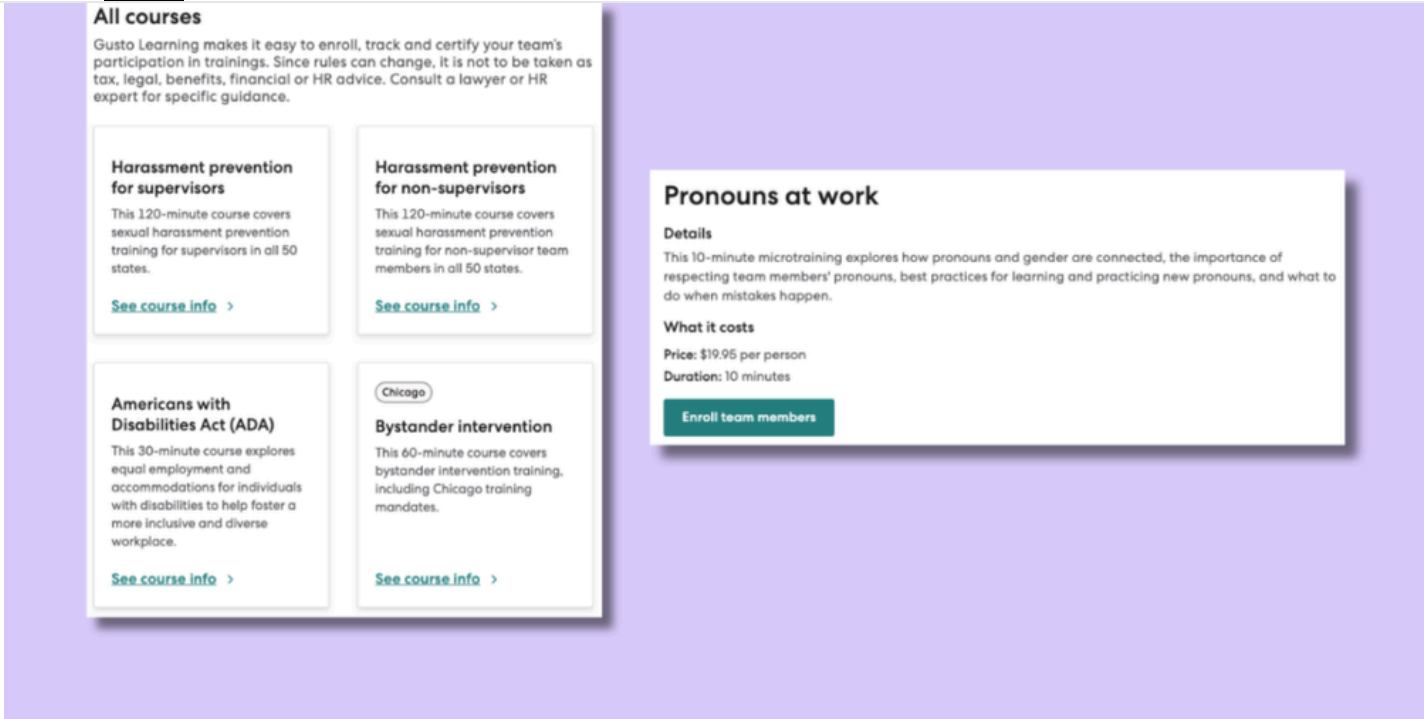
The tasks and milestones associated with each month vary depending on the role and company, but generally, here's what a 30-60-90 day onboarding plan sets out to accomplish:

- **At the 30-day mark**, the new hire should understand the responsibilities associated with their position and how their role fits into the organization's overall structure. They should be acquainted with their manager, team and cross-functional partners (including HR). They should also have access to all of the tools needed to carry out their work.

Mercedes suggests managers schedule a check-in with their new hire at the 30-day mark. "It's an opportunity to discuss how they're settling in and make any necessary adjustments to their onboarding plan.

- **At the 60-day mark**, your new hire should be ramping up and starting to contribute to the team. Most of their initial training sessions should be complete, and they should be shadowing coworkers and applying what they've learned on the job. At this point, they should have a clear understanding of the goals associated with their role (key performance indicators or KPIs) and how their performance will be measured.

Editor's tip: [Talent management software](#) can revolutionize your 30-60-90 day onboarding plan. This particular kind of [HR software](#) is designed to facilitate performance evaluations. Many top-rated options come with a learning management system (LMS) to create training content (and some LMS have a library of prebuilt courses that cover compliance topics and soft skills).



An overview of compliance courses available through Gusto Learning

- **At the 90-day mark**, your new hire should be working on their first few assignments or projects. Success here can be measured by how confident and comfortable your new hire feels handling the daily and weekly responsibilities of their role. That said, now is the time to gather their feedback on the onboarding process and conduct a performance review. While you shouldn’t expect your new hire to hit all of the KPIs associated with their role at this point, conducting a performance review will reveal areas where they may need further training.

90-day onboarding: do’s and don’ts

Do	Don’t
Identify relevant milestones for the 30-, 60- and 90-day marks	Expect your new hire to ramp up completely in their first 90 days on the job
Have HR and managers continue to check in with the new hire regularly to see how they’re acclimating (weekly for the first 30 days, then biweekly)	Skip asking for feedback on your recruiting and onboarding processes



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Frequently asked questions (FAQs)

How long does onboarding take?

According to the Society for Human Resource Management (SHRM), onboarding activities can span just a few days or up to a year. That said, a 90-day onboarding process is fairly standard across businesses of varying sizes.

What should be included in an onboarding checklist?



How much does it cost to onboard an employee?



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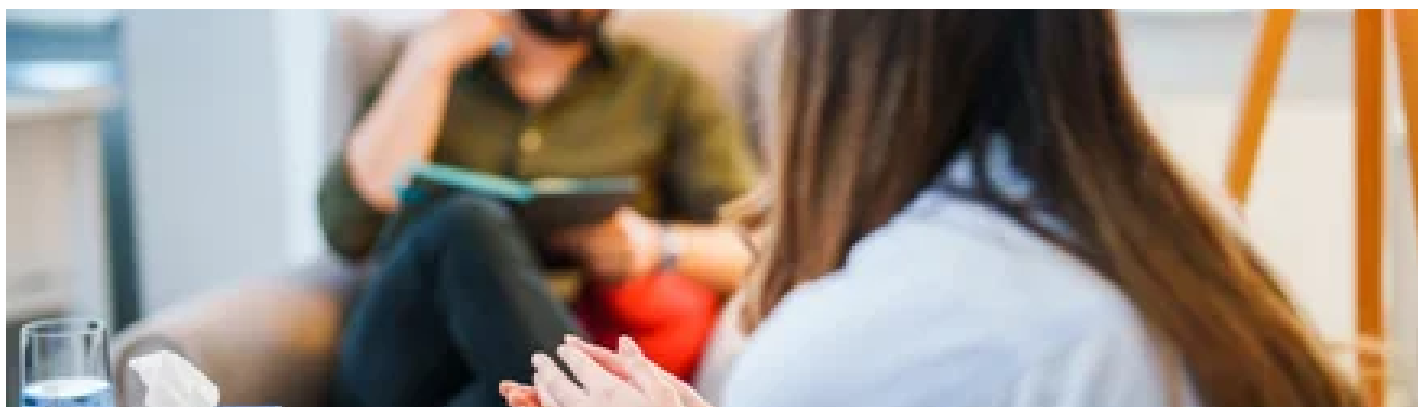
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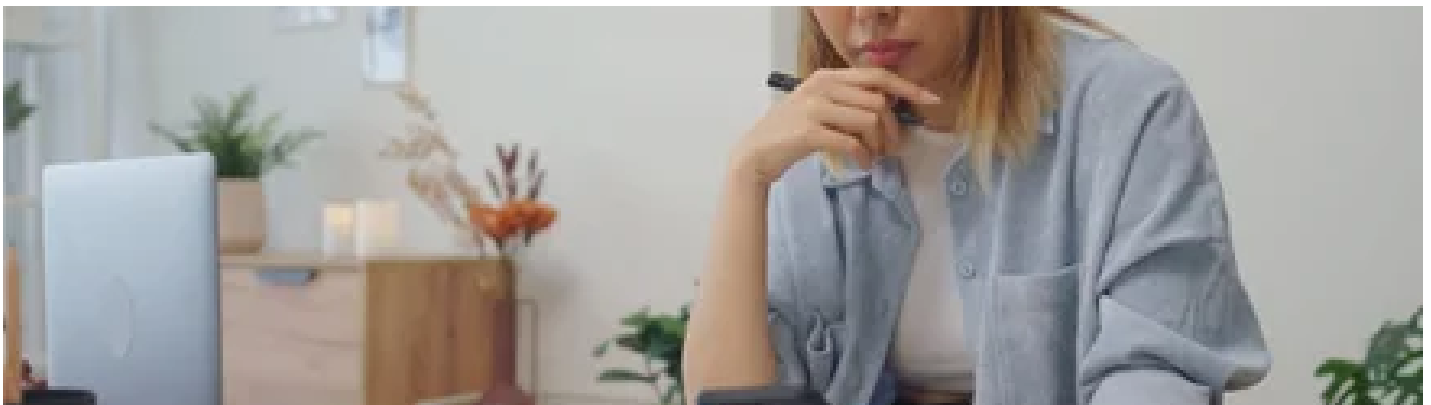
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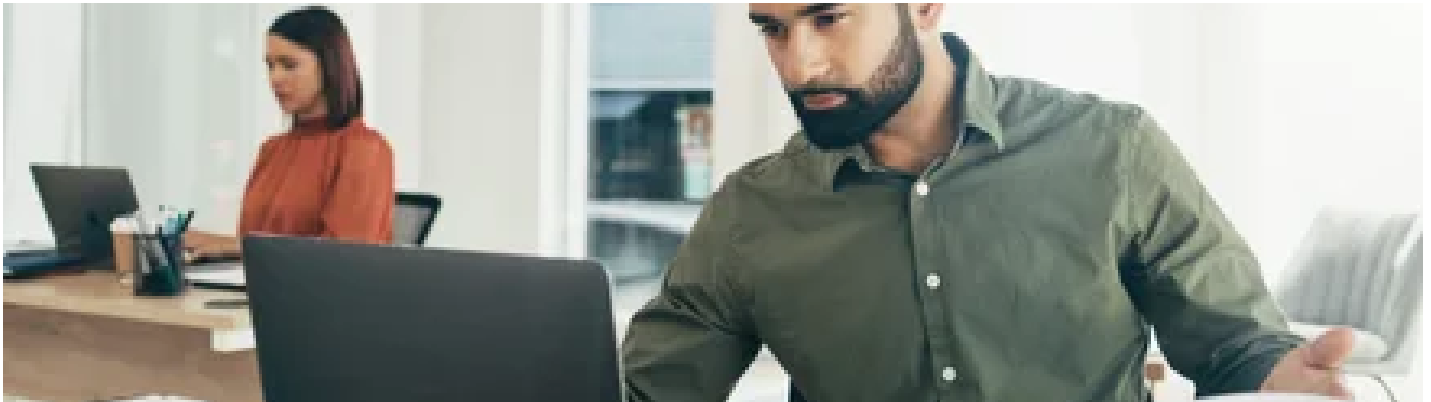


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