New Hire On-boarding Checklist

Simplify the On-boarding Process with a Step-by-Step Guide

1. Pre-Employment Preparation (Pre-boarding)

- Offer letter sent and signed

- Welcome email sent

- IT equipment ordered and set up

- Desk/workspace prepared

- Access to necessary software and systems arranged

- Verify Employment Eligibility (Form I-9): https://www.uscis.gov/i-9

- Enroll in E-Verify if required: https://www.e-verify.gov/

- Complete Form W-4 (Employee Withholding Certificate): https://www.irs.gov/forms-pubs/about-form-w-4

- Complete NC State Tax Withholding Form NC-4: https://www.ncdor.gov/

- Provide Direct Deposit Authorization Form

- Conduct Background Checks (if applicable)

- Prepare Employee's Workstation & Equipment

2. First Day On-boarding

- Welcome meeting with HR

- Introduction to team and key colleagues

- Office tour and facilities orientation

- IT setup and login credentials provided

- Review of company policies and procedures

- Provide Employee Handbook & Obtain Acknowledgment

- Review At-Will Employment Agreement (if applicable)

3. First Week On-boarding

- One-on-one meeting with manager

- Job role and responsibilities overview

- Training schedule provided

- Introduction to key projects and tasks

- Set up regular check-in meetings

- Conduct Anti-Harassment & Discrimination Training (EEOC Compliance)

- Explain Workers' Compensation Coverage & Reporting Process

4. First Month On-boarding

- Ongoing training and development

- Feedback and performance discussions

- Social integration activities

- Review of progress and goals

- Address any questions or concerns

- Register Employee for Payroll System

- Provide Information on Health Insurance & Retirement Plans (if applicable)

- Discuss Paid Time Off (PTO), Sick Leave & Holiday Policies

5. First 90 Days On-boarding

- Performance review and feedback session

- Set long-term goals and development plan

- Confirm understanding of role and expectations

- Collect feedback on on-boarding experience

- Finalize on-boarding and transition to regular performance management

6. Payroll & Benefits Setup

- Ensure Employee is properly classified (W-2 vs. 1099 Contractor)

- Enroll Employee in Workers' Compensation if Required: https://www.labor.nc.gov/

- File Payroll Tax Forms (W-2s for employees, 1099s for contractors)

- Ensure proper payroll tax withholding (Federal & NC State Taxes)

7. Workplace Policies & Safety Training

- Review Workplace Safety Policies (OSHA Compliance): https://www.osha.gov/

- Explain Cybersecurity & Data Protection Policies

- Conduct Workplace Security Training

- Provide Emergency & Evacuation Procedures

8. IT & Security Setup

- Provide Employee Email & System Access Credentials

- Grant Access to Company Software & Tools

- Review Cybersecurity Best Practices

9. Final Steps for a Successful On-boarding

- Ensure all documents are signed and stored securely.

- Encourage open communication and questions during on-boarding.

- Stay compliant with NC employment laws: https://www.labor.nc.gov/

- Contact C. Moses Consulting for customized HR solutions: https://www.cmosesconsult.com/