New Hire Packet Checklist (HR Basics)

Use this checklist to ensure all essential documents and procedures are in place when onboarding a new employee. A well-organized new hire packet helps ensure compliance, sets expectations, and supports a smooth transition.

[ ] Offer Letter or Employment Agreement

[ ] Job Description

[ ] Completed I-9 Form (Employment Eligibility Verification)

[ ] Completed W-4 Form (Employee's Withholding Certificate)

[ ] State Tax Withholding Form (if applicable)

[ ] Direct Deposit Authorization Form

[ ] Emergency Contact Information

[ ] Employee Handbook or Policies Acknowledgment Form

[ ] Confidentiality or Non-Disclosure Agreement (if applicable)

[ ] Benefits Enrollment Forms (Health, Dental, Vision, etc.)

[ ] Copy of Government-Issued ID (for I-9)

[ ] Completed Background Check Authorization (if required)

[ ] Training Schedule or Onboarding Plan

[ ] Workplace Safety and Conduct Policy Acknowledgment

[ ] Company Property Issuance Form (laptop, badge, phone, etc.)

[ ] Signed Receipt of All Submitted Documents