New hire paperwork checklist (US)

Employee name: _____

Start date (first day of work for pay): _____

Work state: _____

HR contact: _____

Federal forms

Form	Deadline or rule	Done	Date
Form W-4 (current year version from irs.gov)	Before the first payroll	☐	
Form I-9, Section 1 (employee)	No later than the first day of employment	☐	
Form I-9, Section 2 (employer reviews documents)	Within 3 business days of the first day	☐	
E-Verify case (if enrolled or required by your state)	After the I-9 is complete	☐	

State and payroll

Item	Deadline or rule	Done	Date
State withholding certificate (states with income tax)	Before the first payroll	☐	
State new hire report	Within 20 days of hire under federal law; many states require sooner	☐	
State-required notices at hire (for example, pay rate notice)	At hire; check your state	☐	
Direct deposit authorization (if the employee chooses it)	Before the first payroll	☐	
Pay rate, pay schedule and overtime status confirmed in writing	Before the first payroll	☐	

Company documents

Item	Notes	Done	Date
Signed offer letter		☐	
Employee handbook acknowledgment		☐	
Emergency contact form		☐	
Benefits enrollment or waiver		☐	
Confidentiality or other agreements (if used)		☐	

Keep each Form I-9 for 3 years after hire or 1 year after employment ends, whichever is later.

_____ _____

Completed by Date

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