

# Startup hiring Checklist Template

## Pre-hiring Checklist

### Employer Information

- x Employer Name:
- x Employer Address:
- x Employer Phone:
- x Employer Email:
- x Employer EIN set up?
- x Employer State Taxes set up?
- x Employer Locality Taxes set up?
- x Worker's Comp Insurance Obtained?
- x Mandatory Labor Law Postings Posted?

### Payroll Tax Information

- x W-4 Federal Tax Withholding Form complete?
- x W-4 State Tax Withholding Form complete?
- x Employee 1-9 Form complete?

### Checklist for the hiring team

Identify the need to hire a new employee  
Allocate the hiring budget  
Create a detailed job description  
Set up the interview panel  
Identify the job boards (sponsored or paid) for recruitment marketing  
Set criteria for resume screening for filtering unqualified candidates  
Set up tests in prescreening tools.  
Create an interview toolkit  
Create canned responses that can be sent to selected candidates.

# Post-Hiring Checklist

## Offer Information

- × Was the offer letter sent?
- × Passed background check?
- × Successful drug screen?
- × Was the employment agreement signed?

## Employee Information (To input into the HR system)

- × Employee Name:
- × Employment Phone:
- × Employee Email:
- × Employee Home Address (include zip code)

## Job Information

- × Job Title:
- × Supervisor:
- × Job Description

## Employee File

- × Create an Employee Personnel Folder (By last name or date of hire)
- × Mail Employee details to State New Hire Reporting Agency (See SBA for list)
- × Gather new hire documents such as:
  - employee handbook
  - policy documents for review or signature (i.e. NDA or Non-compete)
  - direct deposit form
  - employee benefits enrolment form
  - employee datasheet
- × Was the employee data sheet with emergency contact information completed?
- × Employee Direct deposit sign-up form with the voided check?
- × Employee benefits program overview and the due date for sign-up locations/instructions)?

## Employee Onboarding

- × Set up the workspace with supplies such as a computer, phone, desk, chair, and office supplies
- × Provide login IDs for computers, software, and applications
- × Set up a time card or entrance badge
- × Meet supervisor, trainer, and co-workers

## Virtual Employee Onboarding

- × Expand your position to employees by email or phone. Add new employees to the remote onboarding system. Coordinate the onboarding process with company leaders.
- × Set up and dispatch tech gear and company-stolen goods.
- × Tell the team who will join the company.
- × Validate work permit document.
- × Introduce a new employee to your team.
- × Inform employees about companies, products, and customers.
- × Make sure you and your new employee are on the same page.
- × Enjoy getting to know new employees!
- × Start department-specific training for new employees.
- × Set goals, projects, and reviews for 30, 60, and 90 days.
- × Make sure your benefits and salaries run smoothly.
- × Chat with stakeholders/colleagues about new employees.
- × Start with weekly check-in and one-on-one meetings with new employees.