symply™

ONBOARDING CHECKLIST

Congratulations on hiring a new employee! A successful onboarding experience will ensure a smooth transition into your company and will set your employee up for long term success. Use this checklist to cross off your onboarding to-do's and officially welcome your new hire to your company.

Did you know it takes an average of 8 months for a new employee to become fully productive?!?

BEFORE THEY CAN GET STARTED...

1 **Obtain a signed copy of the W-4 form**
- This form is used to calculate how much federal income tax you need to withhold from your employee's paycheck.

Get the W-4 form here: https://www.irs.gov/pub/irs-pdf/fw4.pdf

2 **Obtain a signed copy of the I-9 form**
- This form ensures your employee is legally allowed to work in the U.S.A

Get the I-9 form here: https://www.uscis.gov/i-9

3 **File a new hire report**
- New Hire reporting is a process by which you, as an employer, report information on newly hired employees to a designated state agency shortly after the date of hire. As an employer, you play a key role in this important program by reporting all your newly hired employees to your state.

Submit your new hire here: https://www.acf.hhs.gov/css/contact-information/state-new-hire-reporting-websites

4

Set up direct deposit

- Most small businesses pay their employees via direct deposit instead of paper checks.
- Have your new hire submit a blank check or their ACH bank information so you can set up their direct deposit as soon as possible so they can get paid without a long lag after they start working.

Decide on a [payroll provider](#) for direct deposits, such as Symply.

4

Ensure EEO compliance (Equal Employment Opportunity)

- Is your business required to report data to the Equal Employment Opportunity Commission? If so, you'll need to collect some demographic info from your new hire.

Report EEO compliance here: https://www.eeoc.gov/employers/eeo-data-collections

5

Check references & conduct a background check if necessary

- References will help verify your employee's work history
- If your employee will be handling money or have access to confidential files, it's a good idea to conduct a background check.

Select a background checking service here:
https://www.betterteam.com/best-background-check-services

6

Outline staff schedules

- It's important to outline your business's staff scheduling policy as early as possible. This includes shift length expectations, break policies, how to submit requests for time off, whether or not they should expect to be called in to cover shifts, and how to handle sick days.

Use a free online employee scheduling app to make things easy:
https://joinhomebase.com/free-employee-scheduling

7

Set them up in your staff systems.

- Get your employee set up in your POS system, your employee payment portal (where they can see things like pay stubs and tax information), and your scheduling app, if you use one. Give a brief overview of how to use each system.

8

Review company culture & employee expectations

- You've worked extremely hard to create a company you believe in. Make sure your new employee understands your culture, values and what is expected of them while they are representing your brand.

7

TIME TO CELEBRATE!

You've now completed all necessary steps of employee onboarding. Congratulations! Want to make it even easier on you and your new hire? Use Symply's onboarding tool.

Skip the paperwork and create a repeatable process with self-service employee onboarding. Sign up for free so your new hires can hit the ground running on their first day.

Use Symply's Onboarding tool here: https://pages.symply.io/onboarding

Paperless employee onboarding at no cost

Sign Up for Free