



New-hire preparation checklist

A practical starting point for welcoming an employee and organizing the details before their first payroll.

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- ☐ **Confirm the role and start date**
Record the job title, work location, supervisor, start date, agreed pay, and pay schedule. Review classification and applicable wage requirements with your adviser.
- ☐ **Plan the employment forms**
Use current W-4, California DE 4, and USCIS I-9 instructions. Assign responsibility for completion and verification; follow each form's timing and document requirements.
- ☐ **Arrange new-hire reporting**
Identify who will report the employee to California EDD. Check the official new-hire reporting instructions and deadline, and retain the confirmation.
- ☐ **Prepare the first-day information**
Gather applicable notices, policies, schedule information, and a contact for questions. Review workplace posting and notice requirements for your business.
- ☐ **Set up timekeeping and payroll**
Explain how to record hours and request time off. Confirm the first pay period, payroll cutoff, payment method, and any required payment authorization.
- ☐ **Store records securely**
Confirm a secure method for collecting employee information. Limit access to sensitive records and schedule a review before the first payroll.

Use this as an organizing aid, not a complete hiring compliance checklist. Requirements vary by role, location, and circumstances. Do not enter SSNs or bank details on this checklist.

Official sources and online guide

Cal Payroll / resources / new-hire-checklist