

New Employee Setup Checklist

The payroll and compliance steps for hiring your first employee.

Before Day One

- ☐ Get an EIN if you don't already have one
- ☐ Register for state unemployment insurance
- ☐ Decide on pay frequency (weekly, biweekly, monthly)
- ☐ Choose a payroll provider or process

Paperwork

- ☐ Have the employee complete Form W-4
- ☐ Have the employee complete Form I-9 (verify ID within 3 days)
- ☐ Collect direct deposit information
- ☐ Report the new hire to your state new-hire registry

Pay & Benefits

- ☐ Confirm minimum wage and overtime rules for your state
- ☐ Set up any benefits you're offering
- ☐ Decide on a PTO/sick leave policy

Ongoing

- ☐ Withhold and remit payroll taxes on schedule
- ☐ File quarterly payroll tax returns (Form 941)
- ☐ Issue a W-2 at year-end