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New Hire Payroll Checklist

Get every new hire set up correctly from the start.

- [ ] **Collect Form W-4**
  Make sure the employee completes their federal withholding information.
- [ ] **Complete state withholding forms**
  Collect any required state tax forms based on where the employee works and lives. CA is the DE-4. This can be especially important for military personnel whose state withholding requirements may differ.
- [ ] **Verify Form I-9 is completed**
  Confirm employment eligibility documentation is completed within the required timeframe.
- [ ] **Enter employee information carefully**
  Double-check legal name, Social Security number, address, and date of birth.
- [ ] **Confirm pay details**
  Verify hourly rate or salary, pay frequency, department or job, and effective date.
- [ ] **Set up direct deposit**
  Collect and verify banking information—if the employee selects direct deposit.
- [ ] **Add deductions and benefits**
  Set up applicable insurance, retirement contributions, garnishments, or other deductions.
- [ ] **Review sick and vacation policies**
  Make sure the employee is assigned the correct PTO and sick leave policies
- [ ] **Confirm everything before the first payroll**
  Review the employee's setup before processing their first paycheck.
- [ ] **Review first paycheck**
  Run a test check or review when you run payroll.

SET UP RIGHT FROM DAY ONE.

The right employee information. The right payroll details. A smoother first paycheck.

Contact us at pinkpayroll.com/quote to get started or get more info