

Employee Onboarding Checklist

Payroll & Employer Resources | Checklist | Updated October 15, 2026

A document-gathering list for adding a new employee to payroll.

Who should use this resource?

Designed for small business readers who want to organize records and prepare informed questions.

What this resource covers

1. Collect required identity and payroll details securely
2. Provide current federal and state forms as applicable
3. Record start date, pay schedule, and authorized compensation
4. Confirm reporting steps with the payroll provider

How to use it

Work through each item using your own records. Mark items complete as you gather documents or finish a review. Keep original source records securely and check current instructions before filing or paying taxes.

Review checklist

- ☐ Collect required identity and payroll details securely
- ☐ Provide current federal and state forms as applicable
- ☐ Record start date, pay schedule, and authorized compensation
- ☐ Confirm reporting steps with the payroll provider

Common mistakes to avoid

Do not rely on an earlier year's rule, estimate figures without source documents, or treat this worksheet as an official tax form. Verify current instructions before filing or paying.

Official references

IRS: Publication 15, Employer's Tax Guide: <https://www.irs.gov/forms-pubs/about-publication-15>

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