

NEW HIRE PAYROLL ONBOARDING CHECKLIST

Payroll Administration Record

| | | | |
|---------------------------|--|--------------------------|--|
| Employee Name | | Employee ID | |
| Job Title | | Department | |
| Start Date | | Pay Frequency | |
| Manager/Supervisor | | Employment Status | |

1. Document Collection & Compliance

Form W-4 (Federal Tax Withholding)

Ensure complete, signed, and dated with correct withholding selections.

State & Local Tax Withholding Forms

Collect applicable state and local withholding certificates based on work/resident location.

Form I-9 (Employment Eligibility Verification)

Verify Section 1 is complete; examine original ID/work authorization documents and complete Section 2.

Direct Deposit Authorization Form

Obtain completed authorization form accompanied by a voided check or official bank letter.

2. Payroll System Setup

Personal Profile Creation

Enter Name, Address, Social Security Number, and Contact Information in the payroll system.

Compensation Details & Job Information

Configure Salary/Hourly rate, FLSA status (exempt vs. non-exempt), pay frequency, and department code.

Tax Profile Settings

Input federal, state, and local tax selections exactly as indicated on W-4/state tax forms.

Direct Deposit Allocation

Input routing numbers, account numbers, and account types (checking/savings) into the payroll database.

3. Time & Attendance, Benefits Setup

Time Tracking System Assignment

Assign employee to appropriate timesheet group, timecard policy, or time-clock terminal.

Standard Deductions & Benefits Enrollment

Configure pre-tax and post-tax payroll deductions for medical, dental, vision, life insurance, and HSA/FSA plans.

Retirement Contribution Setup

Set up 401(k)/403(b) deduction percentage or flat rate, employer matching rules, and loan deductions if applicable.

Accrual Policy Enrollment

Assign appropriate Paid Time Off (PTO), sick leave, and vacation accrual templates.

4. Verification & Authorization

Internal Audit & Verification Run

Run a mock payroll or profile audit to verify the accuracy of the entered rate, taxes, and deduction codes.

Payroll Specialist Signature

Date Completed

Authorized Approver Signature

Date Approved