

NEW HIRE PAYROLL SETUP CHECKLIST

Payroll & HR Administration Onboarding Record

Employee Name:

Start Date:

Department / Cost Center:

Pay Frequency:

Job Title:

Payroll ID / EE Number:

1. EMPLOYEE DOCUMENTATION & INTAKE

Task / Document Description	Date Completed	Completed By
☐ Collect and verify completed Form W-4 (Federal Withholding)	_____	_____
☐ Collect and verify completed State/Local Withholding Forms	_____	_____
☐ Complete Form I-9 (Employment Eligibility Verification) & inspect docs	_____	_____
☐ Collect Direct Deposit Authorization Form & voided check / bank letter	_____	_____
☐ Obtain signed Employee Handbook and payroll policy acknowledgment	_____	_____

2. PAYROLL SYSTEM SETUP

Task Description	Date Completed	Completed By
☐ Enter employee profile details (Name, Address, SSN, DOB, Gender)	_____	_____
☐ Input job details (Hire Date, Title, FLSA Status, Department, Work Location)	_____	_____
☐ Configure compensation rates (Hourly Rate / Salary Amount)	_____	_____
☐ Assign pay schedule (e.g., Weekly, Bi-weekly, Semi-monthly, Monthly)	_____	_____

Task Description	Date Completed	Completed By
☐ Input tax withholding parameters based on federal/state W-4 forms	-----	-----
☐ Input direct deposit routing and account information	-----	-----

3. TIME & ATTENDANCE / ADDITIONAL INTEGRATIONS

Task Description	Date Completed	Completed By
☐ Set up employee profile in time tracking software / timeclock system	-----	-----
☐ Assign manager/approver to employee profile in time tracking system	-----	-----
☐ Enroll employee in benefits/deductions (Health, Retirement, HSA)	-----	-----
☐ Configure PTO / Sick Time accrual policy and starting balances	-----	-----

4. VERIFICATION & TRIAL RUN

Task Description	Date Completed	Completed By
☐ Double check system tax configuration against source documents	-----	-----
☐ Run a simulation or verify data on pre-payroll register (if applicable)	-----	-----
☐ Confirm employee registration on the employee self-service portal	-----	-----

Prepared By (HR Representative Signature)

Date: -----

Approved By (Payroll Administrator Signature)

Date: -----