

First-Hire Checklist

Welcoming your first employee is exciting, but also presents legal and administrative responsibilities. Here are six things you need to do:

1



Ensure that you're **IRS compliant** by completing the necessary forms:

Form SS-4
APPLICATION FOR EMPLOYER IDENTIFICATION NUMBER (EIN)

Form I-9
EMPLOYMENT ELIGIBILITY VERIFICATION

Form W-4
WITHHOLDING ALLOWANCE CERTIFICATE



2



Select and implement your **HR tech stack** with tools that streamline your recruiting, onboarding and employee lifecycle processes:



✓ Applicant tracking system

✓ Payroll system

✓ HRIS

3



Decide what the **onboarding process** looks like to create a seamless experience for your new hire that results in longer employee retention. Prepare documents including:

✓ Employee handbook

✓ Direct deposit form

✓ Emergency contact form

✓ Non-disclosure agreement

✓ Benefits overview

✓ Organizational charts



4



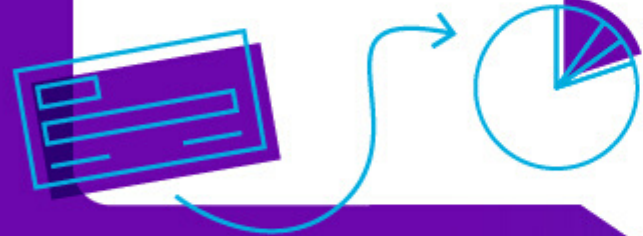
As an employer, you'll draw **employment tax withholdings** from your employee's paycheck – and make contributions of your own.

Employee obligations:

MEDICARE
SOCIAL SECURITY
STATE AND FEDERAL INCOME
TAX W-4 ALLOWANCES

Employer obligations:

MEDICARE
SOCIAL SECURITY
FEDERAL UNEMPLOYMENT
TAX (FUTA)
STATE UNEMPLOYMENT
INSURANCE (SUI)

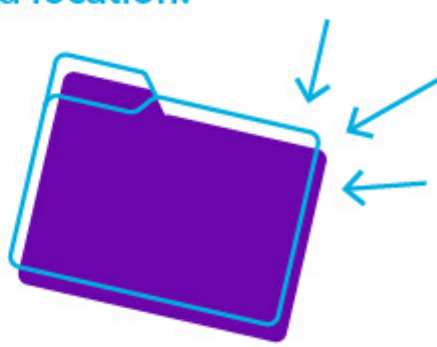


5



Keep a confidential **personnel file** for each new hire, leveraging your tech stack to store these documents in one centralized location:

JOB APPLICATION MATERIALS
SIGNED NEW HIRE AGREEMENTS
TAX DOCUMENTATION
PERFORMANCE EVALUATIONS
PERSONAL RECORDS



6



When making these preparations, check **local labor regulations** to ensure that your company remains compliant from start to finish.



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