

New Hire Payroll Forms Checklist

Use this checklist before a new employee sends information to HR or payroll.

Federal forms

- Review Form W-4 for federal income tax withholding.
- Review Form I-9 instructions and acceptable document timing.
- Confirm whether the employer uses an online onboarding or payroll provider system.

Payment setup

- Ask whether the employer requires its own direct deposit form.
- Prepare bank name, account type, routing number, and account number only for the trusted employer process.
- Keep bank details out of email and untrusted websites.

State and local forms

- Check whether the work state requires a state withholding form.
- If residence state differs from work state, ask payroll about reciprocity or exemption rules.
- Verify state forms on the official state agency website.

Before submitting

- Check the form year and official source.
- Confirm who signs the form.
- Submit completed forms only through the employer, payroll provider, payer, or official process.

Important notice

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