

Pre-Employment Checklist — Candidate Onboarding Guide

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Overview

This checklist helps candidates prepare required documents and complete pre-employment tasks smoothly. Provide the following items and complete tasks prior to your first day.

1) Required Documents (bring originals or upload securely)

- Government-issued photo ID (passport or driver's license)
- Social Security card or tax ID (as required by jurisdiction)
- Work authorization or visa documents (if applicable)
- Educational certificates or transcripts (if requested)
- Professional licenses (if role-specific)

2) Background & Reference Checks

- Provide at least two professional references with contact details.
- Expect a background screen which may include employment verification, criminal record check, and education verification. Provide consent promptly to speed processing.
- Drug screening: if required, follow the instructions provided by the screening vendor.

3) Payroll & Tax Forms

- Complete W-4 (or local equivalent) for tax withholding.
- Provide bank details for direct deposit (voided check or bank letter may be requested).
- Complete any local payroll setup forms required by HR.

4) Benefits Enrollment (complete within your eligibility window)

- Choose medical, dental, and vision plans and submit dependents' information where applicable.
- Elect retirement plan contributions and other voluntary programs.
- Submit required documents for dependents and beneficiaries.

5) IT & Security Preparation

- Provide preferred personal email and confirm device readiness if using personal device.
- Expect an onboarding email with instructions to set up corporate SSO, MFA, and company account access.
- Complete the required security training modules before your start date if provided.

6) First-Day Logistics

- Confirm start date, time, and location (or virtual onboarding link).
- Review the agenda for orientation and training sessions.
- Contact your recruiter or hiring manager with any scheduling conflicts at least 48 hours in advance.

7) Workspace & Equipment (remote or hybrid)

- If the company provides equipment, confirm shipping address and delivery date.
- If using personal equipment, ensure it meets minimum requirements (OS, browser, RAM, camera) and is

updated.

- Request necessary software licenses and VPN access as instructed.

8) Points of Contact

- Recruiter: recruitment-support@example.com
- HR Onboarding: onboarding@example.com
- IT Support: it-helpdesk@example.com

9) Final Notes

- Keep copies of all submitted documents and confirmations.
- Prompt action on requested forms speeds onboarding and benefits activation.
- Notify HR immediately if there are any discrepancies or questions regarding paperwork.

Welcome aboard — we look forward to having you on the team!