

Faulkner HR Solutions

New Hire Checklist

Practical Compliance Tool – Updated for September 2025

Redesigning the Way Organizations Grow



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Texas New Hire Onboarding Checklist

The Complete Guide for Texas Employers

This comprehensive checklist is designed to guide Texas employers through every aspect of the new hire onboarding process, ensuring compliance with all federal, state, and local legal requirements while implementing best practices for employee experience. By following these detailed steps, you can create a smooth, professional, and legally compliant onboarding experience that sets your new employees up for success.

Why This Checklist Matters: Proper onboarding reduces turnover by 82% and improves productivity by over 70%. More importantly, it protects your business from costly compliance violations and legal issues that can arise from incomplete or improper onboarding procedures.

I. Pre-Boarding (1-2 Weeks Before First Day)

This critical phase sets the foundation for a successful onboarding experience and ensures all legal and administrative requirements are properly addressed before the employee's first day.

A. Offer and Employment Documentation

- **Extend Comprehensive Offer Letter:** Include position title, department, reporting structure, salary/wage rate, start date, work schedule, employment status (full-time/part-time), and any contingencies (background check, drug test, reference verification).
- **Prepare Employment Agreement:** Include at-will employment statement (Texas is an at-will state), detailed job description, compensation structure, benefits eligibility, and any restrictive covenants (non-compete, non-disclosure, non-solicitation agreements).
- **Obtain Signed Acceptance:** Ensure new hire signs and returns offer letter and employment agreement. Set deadline for response and follow up if needed.
- **Verify Start Date Logistics:** Confirm start date, time, location, and first-day contact person with new hire.

B. Pre-Employment Screening (Must Be Conditional on Job Offer)

- **Background Check (If Required):**
 - Obtain written authorization using FCRA-compliant disclosure and authorization forms
 - Use reputable background check provider
 - Ensure checks are job-related and consistent with business necessity
 - Follow adverse action procedures if negative results require rescinding offer
- **Drug Testing (If Required):**
 - Ensure policy is applied consistently to all similarly situated employees
 - Use certified testing facility
 - Follow DOT requirements if position is safety-sensitive
 - Maintain confidentiality of results
- **Reference Verification:** Contact previous employers, verify employment dates, job titles, and eligibility for rehire.
- **Education/Credential Verification:** Verify degrees, certifications, or licenses required for the position.

C. Internal Preparation and Setup

- **Notify Key Departments:**
 - HR/Payroll: Employee information, start date, salary, benefits eligibility
 - IT: System access needs, equipment requirements, security clearances
 - Facilities: Workspace assignment, parking, building access
 - Direct supervisor: Start date confirmation, first-week planning
- **Workstation and Equipment Setup:**
 - Prepare desk, chair, and workspace
 - Order and configure computer, monitor, keyboard, mouse
 - Set up phone line and voicemail
 - Prepare any job-specific tools or equipment

- Test all equipment functionality
- **System Access and Security:**
 - Create user accounts for all necessary systems
 - Set up email account and distribution lists
 - Prepare temporary passwords and login instructions
 - Order security badges, keys, or access cards
 - Schedule IT orientation if needed
- **Welcome Package Preparation:**
 - Employee handbook (current version)
 - Company organizational chart
 - First-week schedule and agenda
 - Office map and directory
 - Company swag or welcome gifts
 - Parking information and permits
 - Business cards (if applicable)

D. Documentation and Forms Preparation

- **Prepare Required Forms:**
 - Form I-9 (Employment Eligibility Verification)
 - Form W-4 (Employee's Withholding Certificate)
 - State tax withholding forms (if applicable)
 - Direct deposit authorization form
 - Emergency contact information form
 - Benefits enrollment forms
 - Employee handbook acknowledgment form
- **Create Personnel File:** Set up physical and/or electronic personnel file with proper security and access controls.
- **Schedule Required Training:** Book any mandatory training sessions (safety, harassment prevention, job-specific training).

II. Day 1: Welcome and Legal Compliance

The first day is critical for both legal compliance and creating a positive first impression. All mandatory paperwork must be completed, and the employee should feel welcomed and prepared for success.

A. Welcome and Initial Setup

- **Warm Welcome:** Greet the new employee personally, express enthusiasm about their joining the team.
- **Provide Welcome Package:** Give employee handbook, first-week schedule, office map, parking information, and any welcome gifts.
- **Office Tour:** Comprehensive tour including workstation, restrooms, break rooms, emergency exits, first aid stations, and key departments.
- **Introduce Key Personnel:** Introduce to direct supervisor, HR representative, immediate team members, and key colleagues they'll work with regularly.
- **Review First Day Agenda:** Go over the day's schedule and expectations.

B. Critical Legal Compliance (Must Be Completed Day 1 or Within 3 Business Days)

- **Form I-9 Employment Eligibility Verification:**
 - **Section 1:** Employee must complete and sign on or before first day of employment
 - **Section 2:** Employer must complete within 3 business days of start date
 - **Document Examination:** Review original, unexpired documents from List A (identity + work authorization) OR combination of List B (identity) + List C (work authorization)
 - **Acceptable Documents:** U.S. passport, driver's license + Social Security card, permanent resident card, employment authorization document, etc.
 - **Record Keeping:** Retain I-9 for 3 years after hire date or 1 year after termination, whichever is later
- **Form W-4 Employee's Withholding Certificate:**
 - Employee completes to determine federal income tax withholding
 - Review for completeness and accuracy
 - Process immediately for payroll setup
- **State Tax Withholding:** Complete Texas state forms if applicable (Texas has no state income tax, but may have other state-specific requirements).
- **New Hire Reporting:** Report new hire to Texas Attorney General's Office within 20 days (can be done electronically at <https://www.texasnewhire.com>).

C. Administrative Setup

- **Direct Deposit Authorization:** Complete with voided check or bank routing/account information.
- **Emergency Contact Information:** Collect comprehensive emergency contact details including relationship, phone numbers, and addresses.
- **Employee Information Form:** Collect all required information per Fair Labor Standards Act (FLSA):
 - Full name and Social Security number
 - Address including zip code
 - Birth date (if under 19)

- Sex and occupation
- Time and day of week when employee's workweek begins
- Hours worked each day and total hours worked each workweek
- Basis on which employee's wages are paid
- Regular hourly pay rate
- Total daily or weekly straight-time earnings
- Total overtime earnings for the workweek
- All additions to or deductions from the employee's wages
- Total wages paid each pay period
- Date of payment and the pay period covered by the payment

D. Technology and Security Setup

- **System Access:** Provide login credentials, passwords, and system access instructions.
- **Email Setup:** Ensure email account is active and accessible, add to relevant distribution lists.
- **Security Badges/Keys:** Issue building access cards, office keys, and any security equipment.
- **IT Orientation:** Basic training on computer systems, software, phone system, and IT policies.
- **Cybersecurity Training:** Initial briefing on password policies, data security, and acceptable use policies.

III. First Week: Integration and Essential Training

The first week should focus on integration into company culture, essential training, and beginning the employee's journey toward productivity.

A. Employee Handbook and Policy Review

- **Comprehensive Handbook Review:** Schedule dedicated time to review employee handbook including:
 - **At-will employment** (Texas is an at-will state with limited exceptions)
 - **Equal Employment Opportunity** and anti-discrimination policies
 - **Anti-harassment and anti-retaliation** policies
 - **Code of conduct** and ethical standards
 - **Attendance and punctuality** policies
 - **Leave policies:** FMLA, state leave laws, vacation, sick leave, personal leave
 - **Compensation and payroll** procedures
 - **Benefits** overview and eligibility
 - **Safety and health** policies
 - **Confidentiality and data security** requirements
 - **Social media and technology** use policies
 - **Disciplinary procedures** and progressive discipline
 - **Grievance procedures** and open door policies
- **Obtain Signed Acknowledgment:** Employee must sign form acknowledging receipt, review, and understanding of handbook.
- **Address Questions:** Allow time for questions and clarification on policies.

B. Benefits Enrollment and Explanation

- **Benefits Overview Presentation:** Detailed explanation of all available benefits including:
 - **Health Insurance:** Medical, dental, vision coverage options, premiums, deductibles, networks
 - **Retirement Plans:** 401(k), employer matching, vesting schedules, investment options
 - **Life Insurance:** Basic and supplemental life insurance options
 - **Disability Insurance:** Short-term and long-term disability coverage
 - **Flexible Spending Accounts:** Healthcare and dependent care FSAs
 - **Other Benefits:** Employee assistance programs, wellness programs, tuition reimbursement
- **Provide Enrollment Materials:** All necessary forms, benefit summaries, and enrollment instructions.
- **Set Enrollment Deadline:** Clearly communicate enrollment deadlines (typically 30 days from hire date).
- **Schedule Benefits Counseling:** One-on-one session if needed to help employee make informed decisions.

C. Essential Training Programs

- **Job-Specific Training:** Begin comprehensive training on specific job duties, responsibilities, and performance expectations.

- **Systems and Software Training:** Training on all job-relevant software, databases, and systems.
- **Safety Training:**
 - **OSHA General Safety Orientation:** Workplace hazards, emergency procedures, reporting requirements
 - **Industry-Specific Safety:** Additional training based on job requirements
 - **Emergency Procedures:** Fire evacuation, severe weather, workplace violence response
- **Compliance Training:**
 - **Anti-Harassment Training:** Required in many jurisdictions, best practice everywhere
 - **Data Security Training:** Handling confidential information, HIPAA (if applicable), cybersecurity
 - **Industry-Specific Compliance:** Financial services, healthcare, manufacturing regulations as applicable

D. Cultural Integration and Relationship Building

- **Assign Buddy/Mentor:** Pair with experienced employee to help with questions and cultural integration.
- **Team Introductions:** Formal introductions to all team members and key collaborators.
- **Department Overview:** Understanding of department structure, goals, and how their role fits.
- **Company Culture Orientation:** Mission, vision, values, and cultural norms.
- **Social Integration:** Invite to team lunch, coffee breaks, or informal gatherings.

IV. First 30 Days: Performance Foundation and Adjustment

The first month is critical for setting performance expectations, providing necessary training, and ensuring the employee is adjusting well to their new role.

A. Performance Management Setup

- **Job Description Review:** Detailed review of job description, duties, and performance expectations.
- **30-60-90 Day Goals:** Collaborate with employee to establish clear, measurable goals for first 90 days.
- **Performance Standards:** Explain how performance will be measured and evaluated.
- **Regular Check-ins:** Schedule weekly one-on-one meetings for first month.
- **Feedback Mechanisms:** Establish how and when feedback will be provided.

B. Continued Training and Development

- **Advanced Job Training:** More complex aspects of the role and advanced skills development.
- **Cross-Training:** Exposure to related functions and backup responsibilities.
- **Professional Development:** Identify training opportunities and career development paths.
- **Certification Requirements:** Begin any required professional certifications or licenses.

C. 30-Day Check-in and Review

- **Formal 30-Day Review:** Structured review of progress, challenges, and achievements.
- **Goal Assessment:** Review progress toward 30-day goals and adjust as needed.
- **Feedback Collection:** Gather employee feedback on onboarding experience and job satisfaction.
- **Address Concerns:** Identify and address any issues or concerns early.
- **Documentation:** Document review in personnel file.

V. First 90 Days: Full Integration and Performance Evaluation

The 90-day mark typically represents the end of the introductory period and is crucial for determining long-term success.

A. Comprehensive Performance Review

- **90-Day Performance Evaluation:** Comprehensive review of job performance, goal achievement, and cultural fit.
- **Competency Assessment:** Evaluate technical skills, soft skills, and job-specific competencies.
- **Goal Achievement Review:** Assess progress toward 90-day goals and overall performance expectations.
- **Areas for Improvement:** Identify specific areas for continued development.
- **Recognition of Achievements:** Acknowledge successes and positive contributions.

B. Future Planning and Development

- **Career Development Discussion:** Explore long-term career goals and development opportunities.
- **Training Plan:** Develop ongoing training and development plan.
- **Performance Improvement Plan:** If needed, create specific plan to address performance gaps.
- **Regular Review Schedule:** Establish ongoing performance review schedule.

C. Final Integration Steps

- **Full System Access:** Ensure employee has all necessary system access and permissions.
- **Complete Independence:** Confirm employee can perform job duties independently.
- **Team Integration:** Full integration into team dynamics and collaborative relationships.
- **Feedback and Adjustment:** Final opportunity to address any remaining onboarding issues.

VI. Ongoing: Retention and Engagement

Successful onboarding extends beyond the first 90 days and requires ongoing attention to employee engagement and retention.

A. Continued Support and Development

- **Regular Performance Reviews:** Establish schedule for ongoing performance evaluations.
- **Professional Development:** Provide ongoing training and development opportunities.
- **Career Pathing:** Regular discussions about career advancement and growth opportunities.
- **Recognition Programs:** Implement employee recognition and reward programs.

B. Engagement and Retention Monitoring

- **Stay Interviews:** Regular conversations about job satisfaction and engagement.
 - **Employee Surveys:** Participate in employee engagement and satisfaction surveys.
 - **Exit Interview Process:** Establish process for learning from departing employees.
 - **Retention Analysis:** Monitor turnover rates and identify improvement opportunities.
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Legal Compliance Quick Reference

Federal Requirements

- **Form I-9:** Must be completed within 3 business days of start date
- **Form W-4:** Required for tax withholding setup
- **FLSA Record Keeping:** Maintain comprehensive employee records
- **OSHA Training:** Required safety training for applicable positions
- **Anti-Discrimination:** Equal treatment regardless of protected characteristics

Texas State Requirements

- **At-Will Employment:** Texas is an at-will state with limited exceptions
- **New Hire Reporting:** Report to Texas Attorney General within 20 days
- **Final Pay Laws:** Understand requirements for final paychecks upon termination
- **Workers' Compensation:** Required for most employers
- **Unemployment Insurance:** Register and pay unemployment taxes

Record Retention Requirements

- **Personnel Files:** Maintain for duration of employment plus 3-7 years
- **I-9 Forms:** 3 years after hire or 1 year after termination, whichever is later
- **Payroll Records:** 3 years minimum under FLSA
- **Training Records:** Maintain records of all required training
- **Performance Reviews:** Keep for duration of employment plus reasonable period

***Disclaimer:** This checklist is intended for informational purposes only and does not constitute legal advice. Employment laws change frequently and vary by jurisdiction. Employers should consult with qualified legal counsel to ensure compliance with all applicable federal, state, and local laws and regulations.*

Overwhelmed by the complexity of compliant onboarding? You're not alone. Our team of HR experts specializes in helping Texas employers navigate the intricate requirements of employee onboarding while creating exceptional employee experiences. From policy development to training programs, we provide the expertise you need to build a world-class onboarding process that protects your business and engages your employees. [Contact us today for a confidential consultation](#) and discover how we can transform your onboarding process into a competitive advantage.