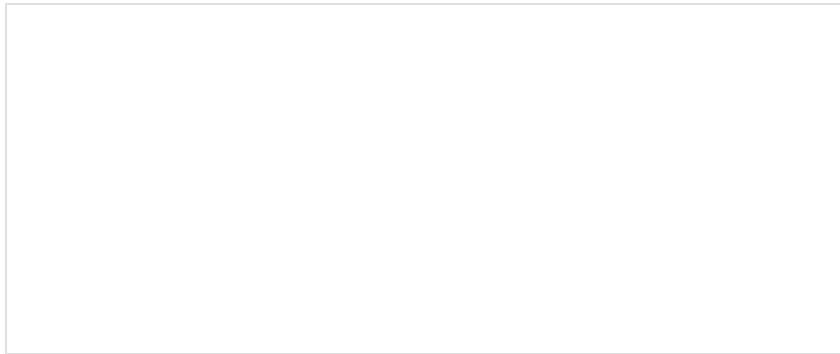


A Quickstart Guide to New Employee Forms

About this Resource



Ever feel like the amount of paperwork you require your employees to fill out when beginning their new job is like having them sign a mortgage?

If so, you're not alone.

This guide is intended to help managers to better understand the forms they are required to collect from new employees.

For each form, we'll cover each of these questions:

- What is it?

- Why is it used?
- When is it used?
- Who should fill it out?
- Where can I find one?

If you're interested in learning more about Lessonly and how we help companies improve the onboarding process, feel free to [start a free trial](#).

Either way, enjoy this guide!

Note: This guide is not to be taken as legal, financial, or tax advice of any kind. Please consult with your legal counsel and accountant to understand what forms are required for your employees' specific situations.

Job Application Form

What is it?

A form someone can fill out to begin or formalize communicating their intent to join your company as an employee.

Why is it used?

If you have a large number of prospective employees applying for jobs at your company, you may want to implement an application form. It will help streamline data aggregation on your prospect pool and potentially help document an equal opportunity process if all possible employees are treated the same.

When is it used?

During the hiring process, before an employee has been hired. Although this is the case, many application forms are filled out simply for formality's sake, especially in larger companies.

Who should fill it out?

A prospective employee, wishing to join your company.

Where can I find one?

[Here](#) or [here](#) or [here](#).

I-9 Form

What is it?

The official form from the IRS for Employment Eligibility Verification.

Why is it used?

Use this form to document the verification of the identity and employment authorization of every new employee (both citizen and noncitizen) hired after November 6, 1986, to work in the United States. Said another way, it documents that your new hire is legally allowed to work in the United States.

When is it used?

Section must be filled out between the time the job offer is accepted and the end of the first day of employment. Section 2 must be completed within 3 days of the first day of employment.

Who should fill it out?

A newly hired employee must fill out Section 1 while the employer or representative must fill out Section 2.

Where can I find one?

[Here.](#)

W-4 Form

What is it?

The official form from the IRS for communicating withholding allowance. It is formally called the Employee's Withholding Allowance Certificate.

Why is it used?

An employee should fill out the W-4 so that you can withhold the correct federal income tax from the employee's pay.

When is it used?

It should at least be completed during the onboarding process of a new employee. Consider reminding your employees to complete a new Form W-4 each year as personal and financial situations change over time.

Who should fill it out?

A new employee, recently hired.

Where can I find one?

[Here.](#)

Direct Deposit Form

What is it?

A form for new hires to communicate their correct bank information to receive their pay automatically.

Why is it used?

Most companies today utilize direct deposit to save on the time and distribution costs of executing payroll. This form allows you to effectively communicate with the payroll department at your company about your new hire's banking information. This will typically include the new hire's bank account and routing number, as well as a canceled check from that account. It may differ from state to state and bank to bank, so be sure to find the one that is best for your situation.

When is it used?

This form should be filled out on the first day a new hire starts his or her job at your company so they can begin getting paid as soon as possible.

Who should fill it out?

A new employee expecting a regularly recurring paycheck from your company.

Where can I find one?

Your company's payroll provider.

We attached this pre-made form from ADP, as a lot of companies use ADP to process their payroll:



[View Fullscreen](#)

[Source File](#)

Employee Info Form

What is it?

This form is a resource and a record to collect general, often non-essential information about your employee.

Why is it used?

This form can be used for a number of reasons and it is solely up to the employer what information is requested. The most common form fields include name, contact information, address, emergency contact information, and even less critical things such as t-shirt size, favorite color, and favorite candy.

When is it used?

This should be filled out either before a new employee starts work or on the employee's first day.

Who should fill it out?

A new employee, recently hired.

Where can I find one?

Here's a template you can download or make your own:



[View Fullscreen](#)

[Source File](#)

Benefits Application Form

What is it?

A form required by your company's benefits providers to gather benefits-related information.

Why is it used?

This form tells your company's benefits providers information that will allow the providers to identify the needs and potential solutions for your employees. It will often include health-related, financial, and even family-related items. Be sure to thoroughly understand this form before distributing it to your employees because there are often more questions about this form than any other. To do so, discuss it with your benefits providers first.

When is it used?

This form should be filled out during the first day of a new employee's time at your company, as well as potentially after a qualifying life event, such as moving to a new state, changes in family size, or some changes in income.

Who should fill it out?

An employee, and those related to the employee who will be enjoying coverage.

Where can I find one?

Your company's benefits providers.

Next Steps

That wraps it up; we hope this guide is helpful.

As your team grows, it will become more and more important to streamline your employee learning, ensuring that everyone has the information they need to get their jobs done.

At [Lessonly](#), we help with that exact thing by making it easy to create bite-size lessons on your company's most important topics. Here's a quick demo of how Lessonly works:

