



FREE DOWNLOAD

First Employee Checklist

Everything you need before your new employee starts

Congratulations on taking the next step in growing your business! Use this checklist to make sure you've covered the essentials before welcoming your first employee.

Planning

- ☐ Decide exactly what role you need.
- ☐ Set the salary and working hours.
- ☐ Prepare a job description.
- ☐ Decide how you'll recruit.

Becoming an Employer

- ☐ Register as an employer with HMRC.
- ☐ Arrange Employers' Liability Insurance.

Before They Start

- ☐ Complete a Right to Work check.
- ☐ Issue an employment contract.
- ☐ Agree a start date.
- ☐ Collect bank details.
- ☐ Obtain their National Insurance number (if available).
- ☐ Ask them to complete a new starter form.

Payroll & Pensions

- ☐ Set up payroll.
- ☐ Register the employee for payroll.
- ☐ Understand your workplace pension responsibilities.
- ☐ Keep payroll records.

HR Documents

- ☐ Prepare an Employee Handbook (if applicable).
- ☐ Have your key workplace policies in place.

First Day

- ☐ Prepare their workstation and equipment.
- ☐ Plan their induction.
- ☐ Introduce them to the team.
- ☐ Provide Health and Safety information.
- ☐ Explain company procedures and expectations.

Employee Records

- ☐ Employment contract filed.
- ☐ Right to Work documents copied.
- ☐ Emergency contact details recorded.
- ☐ HMRC starter information retained.
- ☐ Payroll records established.
- ☐ Workplace pension records established.
- ☐ Annual leave record created.
- ☐ Sickness absence record created.
- ☐ Training record started.
- ☐ Probation review dates diarised.

Need some support?

Crawford Consultancy can help with employment contracts, payroll administration, employee handbooks, HR documentation, workplace policies and ongoing HR support.

crawfordconsultancy.co.uk/contact