New-Hire Benefits Checklist

A repeatable onboarding process helps eligible employees receive timely information, make informed elections and begin payroll deductions accurately.

Before the Start Date

- Confirm employment status, benefits eligibility and applicable waiting period.
- Prepare the benefits overview and enrollment instructions.
- Assign responsibility for entering the employee in HR, payroll and benefits systems.

During Onboarding

- Explain medical, dental, vision, life, disability and supplemental options.
- Provide costs, enrollment deadlines, plan documents and required notices.
- Collect elections or waivers and verify dependent information.
- Offer access to a benefit counselor for individual questions.

After Enrollment

- Confirm the carrier or benefits system received the enrollment.
- Verify payroll deductions and employer contributions.
- Tell the employee where to find ID cards and how to request help.
- Retain enrollment records according to the employer’s document practices.
- Audit the next carrier invoice to confirm the employee was added correctly.

For planning purposes only. Requirements vary by employer, plan and jurisdiction. This resource is not legal or tax advice. Confirm applicable requirements with qualified benefits, legal and tax advisers.