SJBA
South Jersey Business Association

BUSINESS PLANNING SERIES · WORKBOOK 03

Define the Work Before You Make the Hire.

First Employee Hiring & Onboarding Planner



A first hire adds capacity and new employer responsibilities. This workbook helps you define an affordable, supervised role, organize the New Jersey and federal requirements to verify, and plan a structured first 90 days.

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02 · OPERATING NEED

Start with the work that is not getting done

Define the need and the outcome before deciding a hire is the answer.

WHERE ARE YOU STARTING? MARK ONE.

- ☐ **Exploring** — Need identified
- ☐ **Defining the role** — Work mapped
- ☐ **Recruiting** — Role approved
- ☐ **Preparing to start** — Offer accepted

Work not getting done today

Measurable outcome the role should produce

Decision owner

Target start date

Maximum monthly budget

ALTERNATIVES EVALUATED

- ☐ Contractor or agency
- ☐ Outsourced service
- ☐ Part-time role
- ☐ Reprioritize owner time
- ☐ Software or automation
- ☐ Wait and review

NOTES

03 · ROLE DEFINITION

Work inventory and role definition

List the tasks the role would take on, then define how it will be supervised.

Task	Hours per week	Skill needed	Who does it now	Supervision needed	In role?

Schedule and hours

Work location

Tools and equipment

Supervisor

What success looks like at 90 days

NOTES

04 · EMPLOYER COST

Full employer-cost worksheet

Leave values blank until verified. Payroll taxes, insurance, and wage rules change; confirm with your payroll provider and accountant.

Cost item	Monthly	Annual	Verified source and date
Gross pay			
Employer payroll taxes and contributions			
Workers' compensation insurance			
Benefits, if offered			
Payroll service			
Equipment and tools			
Software and accounts			
Training			
Owner supervision time			
Recruiting costs			
Total			

First payroll date

Cash reserve set aside

NOTES

05 · CLASSIFICATION

Classification and legal-obligation questions

These are questions for qualified review, not determinations.

Classification is a legal determination

Whether a worker is an employee or independent contractor, and whether a role is exempt or nonexempt from overtime, depends on legal tests. New Jersey applies its own standards, which can differ from federal rules. Ask a qualified employment attorney or advisor before deciding.

QUESTIONS FOR YOUR ADVISOR

1. Based on how this work is directed and performed, how should this worker be classified?
2. Is the role eligible for overtime under New Jersey and federal rules?
3. Which state and federal registrations and filings apply to us as a new employer?
4. What leave, notice, and recordkeeping obligations apply at our size?
5. What must be in writing before the first day?

NOTES

06 · EMPLOYER READINESS

Employer-readiness verification log

Check each topic against the official source, record the date checked, and confirm applicability with your advisor.

Topic	Official source	Checked	Advisor	Applies?	Action and deadline	Evidence
Employer registration						
Payroll tax withholding and filing						
Workers' compensation coverage						
Unemployment and disability insurance						
Required workplace notices						
Payroll and time records						
Leave obligations						
Wage and hour rules						
Employment eligibility (Form I-9)						
New hire reporting						

NOTES

07 · RECRUITING

Recruiting brief and job-related criteria

Decide how candidates will be evaluated before you read the first application, and apply the same criteria to everyone.

Job title

Pay range (verified)

Schedule

Where the role will be posted

Role summary

Job-related criterion	Why it matters for the work	How it will be assessed	Weight

Keep evaluation job-related

Do not ask about or score protected characteristics such as age, race, religion, disability, pregnancy, national origin, or marital status, and do not ask medical questions before an offer. Review EEOC and NJ Division on Civil Rights guidance.

NOTES

08 · CANDIDATE COMPARISON

Interview evidence and candidate comparison

Record what each candidate showed against each criterion. Use initials, not personal details.

Criterion	Candidate A	Candidate B	Candidate C
Criterion 1			
Criterion 2			
Criterion 3			
Criterion 4			
Criterion 5			
Questions remaining			
Overall assessment			

References and background checks

Record job-related evidence only. Any reference or background check requires the candidate's authorization and must follow applicable law; ask your advisor before starting one.

NOTES

09 · OFFER AND PRE-START

Offer and pre-start coordination

Confirm terms with qualified review, then make sure everything is ready before day one.

Pre-start item	Owner	Due	Done
Offer terms reviewed by a qualified advisor			
Written offer sent and accepted			
Start date confirmed			
Required new-hire forms prepared			
Payroll set up			
Workers' compensation coverage confirmed			
Equipment ordered			
Accounts and access created			
Supervisor's first-week schedule cleared			

Open questions before the start date

NOTES

10 · FIRST WEEK

First-week onboarding schedule

Plan each day with an owner, a resource, and evidence that the item was completed.



Day	Task or training	Owner	Resource	Completed (evidence)
Day 1				
Day 1				
Day 2				
Day 2				
Day 3				
Day 4				
Day 5				
Day 5				

11 · FIRST 90 DAYS

30/60/90-day support and feedback plan

Agree on concrete outcomes and ask for the employee's input at each checkpoint.

Checkpoint	Expected outcomes	Support provided	Employee input	Next focus
Day 30				
Day 60				
Day 90				

Keep it two-way

Feedback should be specific and documented. Performance, disciplinary, or separation decisions require qualified advice; this plan is not a policy.

NOTES

12 · RECORDS AND ACCESS

Payroll, records, and access security

Decide who holds employee records and which systems the new employee can use.

Protect personal information

Do not record identity documents, Social Security numbers, bank details, or passwords in this workbook. Store employee records as your advisor and payroll provider direct.

QUESTIONS FOR YOUR PAYROLL PROVIDER, ACCOUNTANT, AND IT PROVIDER

1 Where will payroll and personnel records be kept, and who can access them?

2 How long must each type of record be retained?

3 How will access be granted, reviewed, and removed?

SYSTEM ACCESS

System or account	Access level	Granted by	Date	Review date

NOTES

13 · CONVERSATIONS AND ACTIONS

Hiring checkpoint, conversations, and action plan

Prepare for the next conversation, then turn decisions into owned, dated actions.

ROLES THAT MAY BE RELEVANT

- ☐ Employment attorney
- ☐ Accountant or CPA
- ☐ Payroll provider
- ☐ Insurance agent
- ☐ HR consultant
- ☐ IT provider
- ☐ Business banker

Conversation 1: professional role | **Name / company** | **Date**

Questions to ask

Documents to bring | **Recommendation received**

Action and owner | **Deadline** | **Follow-up date**

HIRING READINESS

- ☐ Ready to recruit
- ☐ Ready with open items
- ☐ Not ready

PRIORITY ACTIONS

#	Action	Owner	Due	Depends on	Done
1					
2					
3					
4					
5					
6					

Review cadence: _____ Next review date: _____ Visit SJBA to explore current professionals.

14 · SOURCES AND NEXT STEPS

Official sources, About SJBA, and next steps

OFFICIAL SOURCES, CHECKED OCTOBER 2026

NJ Department of Labor and Workforce Development
State employer obligations, required posters, unemployment and disability insurance, and leave programs.
www.nj.gov/labor

U.S. Department of Labor: Wage and Hour Division
Federal minimum wage, overtime, recordkeeping, and family and medical leave rules.
www.dol.gov/agencies/whd

NJ Division on Civil Rights
New Jersey Law Against Discrimination guidance for employers.
www.njoag.gov/about/divisions-and-offices/division-on-civil-rights-home

IRS: Hiring employees
Federal employer tax responsibilities and the forms new employees complete.
www.irs.gov/businesses/small-businesses-self-employed/hiring-employees

U.S. EEOC: Small business resources
Federal guidance on nondiscrimination in recruiting, hiring, and employment.
www.eeoc.gov/employers/small-business

USCIS: I-9 Central
Federal employment eligibility verification (Form I-9) requirements.
www.uscis.gov/i-9-central

Companion article: "Hiring Your First Employee." Find it with SJBA's business resources at southjerseybusinessassociation.org.

About SJBA

Founded in 1994, the South Jersey Business Association is a structured, category-exclusive referral network for South Jersey business owners serving Camden, Gloucester, and Burlington counties. Members hold one seat per professional category and follow attendance and referral standards.

Visit SJBA to explore current professionals

Established business owner? Visit a Meeting

Planning note. This workbook is general educational planning information for South Jersey business owners. It is not individualized legal, employment, tax, payroll, or insurance advice. Requirements vary by municipality, industry, and business; qualified professionals and the relevant authorities should confirm applicable decisions. SJBA does not perform, supervise, or guarantee the work of any member or other professional. Rules change; confirm details with each source. Photos are illustrative, not SJBA members or member projects.