

NEW HIRE CHECKLIST

NAME:

POSITION:

DATE OF HIRE: / /

PRE-EMPLOYMENT:

NOTES:

- _____ Employment Application
- _____ Background Check: Criminal, SSN, Address, Courts, National, Degree Verification
- _____ Drug Testing: P/F Physical: P/F
- _____ Credit Check: FCRA Form Driver History:
- _____ Reference Checks, Verification of previous employment
- _____ Email or mail Offer Letter, NDA & NonCompete - copy in file
- _____ Phone Call to schedule 1st day details (time, what to bring: voided check, LST-copy of pay stub,I-9 docs, SSN for dependents ins, local taxing authority & what %, etc.)
- _____ Welcome email reiterating documents needed on first day

NEW HIRE PAPERWORK:

- _____ New Hire Reporting Sheet
- _____ W-4
- _____ I-9 Verification- Unexpired US Passport or Military ID OR Driver's License AND SS card/Original Birth Certificate (Person who sees/verifies original documents MUST complete & sign the I-9)
- _____ Local Earned Income Tax – complete municipality and %
- _____ Emergency Contact Form
- _____ Mutual NDA
- _____ Non-Compete Agreement
- _____ Direct Deposit Authorization Form
- _____ Return and Care of Company Equipment
- _____ Wage Withholding Authorization
- _____ OT Approval Form
- _____ Photo Release Form
- _____ PA Worker's Comp Rights and Duties Acknowledgement Form
- _____ PTO Info & Holidays
- _____ Voluntary benefits Enrollment Form – Life/AD&D and LTD
- _____ Company Handbook /Acknowledgement Page - HR

NEW HIRE CHECKLIST

_____ COBRA General Notice

XXXXXXXXX **BENEFITS AFTER __ MONTHS:**

_____ Benefits Orientation Packet

_____ Benefits Enrollment Form – EFFECTIVE DATE (other insurance still in effect?)

_____ Company paid Life Ins. Enrollment Form

XXXXXXXXX **BENEFITS AFTER __ MONTHS:**

_____ 401(k) Profit Sharing Plan Enrollment Materials - Book, SPD, Salary Reduction Agreement

OFFICE ADMIN:

_____ Order Computer

_____ Secure desk, chair, place to sit

_____ Set up email & Sync

_____ Cell Phone Account – phone & number

_____ Order Workboots (with metatarsal supports)

_____ Order Uniforms

_____ Go-toMeeting Info – send email with info

_____ Expense Process – Form – send email with info

_____ Office Key/Swipe Card (Office hours from 8 AM to 5 PM – 1 hour for lunch)

_____ Computer/Power Cord/Adapters/Mouse

_____ Business Cards

_____ Alarm Code

_____ Enter all benefit enrollment information into the system

_____ Have Owner sign the NDA & Non-Compete

Completed By:

Date: