

New Employee Checklist

Employee Name:

Job Title:

Start Date:

Supervisor:

Preparation

- Receive/ask for completed Employee Needs Form
- Send Welcome email
- Set up training and agenda - email to new employee
- Arrange equipment/office needs
- Set up calendar invites for training/orientation
- Make employee file (folder & dropbox)
- Create Checklist put in "New Employee Working File"
- Provide culture reading/information to new employee
- Make new employee packet

Orientalion

Human Resources

Forms

- W - 4
- Direct Deposit
- I - 9
- Contact Form
- Medical Application if applicable
- Dental Application if applicable
- HSA app & forms if applicable
- Palmetto Proactive application if applicable

Other

- Dress code
- Discuss protocol for issues and concerns.
- Orientation plan & training schedule

Benefits

- Dental Insurance
- Medical Insurance (FT only)
- Group Auto/Home
- Kroc Center - 10% off
- 403(b) (FT only)
- PTO and Holidays
- Financial Counseling

FLETCH

- Requests/Reimbursements - discuss process
- PTO Request
- Staff Information
- FLETCH bio/picture
- Confidentiality
- FLETCH access/RSS Feed
- Go through FLETCH website
- Org Chart/Structure

Payroll

- Review timesheet & reporting (20th-21st for hourly)
- Direct Deposit-last day of month
- Pay stub access

Performance Evaluations

- Explain 4 month orientation period
- Annual reviews/process/fiscal year

Supervisor - to be completed by new employees supervisor

Work Schedule:

- Discuss expected work hours (i.e., times, days, and weekend responsibilities)
- Give the employee a copy of his/her Job Description. Review position goals and specific tasks.
- Review goals and expectations

Information Technology - to be completed by IT

Telephone/Online Usage

- Set up email; discuss access for mail from web or other software
- Train on copier; printer; scanner; fax; and set - up user.
- Set up computer Server/Dropbox
- Give the employee his/her telephone number or extension.
- Basic phone/voice mail instructions.

Equipment Issued: Make/Model and Serial # (list)

Model/Serial #

Model/Serial #

Facilities - to be completed by Facilities

Parking and Security

- Discuss security procedures relevant to Campus assignment.
- Issue fob and keys to access campus and areas needed.
- Explain where the employee should park.
- Full tour to include all buildings @ PL

List Keys Requested:

- FOB
- Other Keys listed below

List Keys Issued

Administrative Procedures-to be completed by HR

HR Administrative

- Report new hire scnewhire.com
- LTD/STD/Life set up (Prudential)
- Blue Choice set up
- E - Verify complete
- Set up appointment for website picture
- Added to Staff Records
- Background Check complete
- Ministry Meetings Scheduled
- Met Life set up

Finance

- Added to Payroll spreadsheet

Exit

Schedule Exit Interview

Date

Month

Day

Year

Time

Hour

Minute

s

- Notify finance
- Terminate in Propel
- FLETCH Announcement
- Returned Keys and Equipment (see list above)