

# NEW EMPLOYEE ORIENTATION CHECKLIST

EMPLOYEE NAME: \_\_\_\_\_

LOCATION: \_\_\_\_\_

JOB TITLE: \_\_\_\_\_

DATE OF HIRE: \_\_\_\_\_

DEPARTMENT: \_\_\_\_\_

MANAGER: \_\_\_\_\_

HOURS/DAY: \_\_\_\_\_

## BEFORE EMPLOYEE STARTS

- Payroll Status Sheet (HR003)
- Signed Offer Letter - give copy of offer letter to Controller if Sales position
- Assign Employee PrintStream # \_\_\_\_\_
- Complete a Track-It: Provide Employee #, DOH
- Let SLT/Manager know so they can welcome them on the 1<sup>st</sup> day
- Was this Employee a temp? If yes, email Accounting on the status change. Notify Agency.
- MVR – (Drivers, Sales, Executives)
- Background check
- Signing Bonus \_\_\_\_\_

## MEET WITH EMPLOYEE

- Employee Application (HR001)
- W-4 Federal Tax Withholding
- W-4 State Tax Withholding
- I-9 Form & Instructions (Rehire complete section 3)
- Voluntary Self Identification (HR066)
- Job Description (2 copies: 1 for new hire, 1 copy initialed)
- HIPPA Notice (Marth Group Notice of Practices-HIPAA)
- Emergency Contact Form (HR013)
- Confidentiality Form (HR061)
- Corporate User Policy
- PFML letter
- Direct Deposit (HR008)
- Employee Handbook
- Handbook Acknowledgement Form (HR067)
- Employee Notice
- Meal/Rest Break Waiver
- Who's New (HR012)
- IT take picture for badge and Who's New
- Security and QMS Training – Prod. EE help with training
- Give Quality Card

## BENEFITS INFORMATION TO COVER

- Benefit Booklet
- Discuss with EE
  - Medical
  - Dental
  - Life / AD&D
  - LTD/STD
  - 401K Information
- Show benefits on intranet

## AFTER MEETING WITH EMPLOYEE

- Set up in Payroll (Paycor) (Todd)
- Add to "Hours Spreadsheet" (Todd)
- Add to Fidelity (Todd)
- Insurance Forms (Insurance Enrollment in Paycor) (Todd via payroll audit)
- Mail Cobra Information to employee's home
- Add to WEX/LEAP
- Forklift/MPJ Training Required?
- Update Background Check Spreadsheet
- Add cell number to Text EZ site

## WITHIN 30 DAYS OF EMPLOYMENT

- Follow up on benefit elections
- Add to Remodel Health
- Add to VSP
- Add to Delta Dental (DL only)

**\* MUST BE COMPLETED BEFORE FILING \***