

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
- Email IT Onboarding Checklist to Manager
- Assign Employee PrintStream # _____
- Complete a Track-It once checklist is returned
- Let SLT/Manager know so they can welcome them on the 1st day
- Was this Employee a temp? If yes, email Accounting on the status change. Notify Agency.
- MVR – (Drivers, Sales, Executives)
- Background check
- Signing Bonus _____

ONBOARDING WITH EMPLOYEE

- Employee Application (HR001)
- W-4 Federal Tax Withholding
- W-4 State Tax Withholding
- I-9 Form & Instructions (Rehire complete supplement B)
- Voluntary Self Identification (HR066)
- Job Description (1 for new hire, 1 copy initialed for file)
- HIPAA 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

AFTER MEETING WITH EMPLOYEE

PAYROLL (Todd)

Set up in Payroll (Paycor)
Add to Hours Spreadsheet
Add to Fidelity
Insurance Forms (Insurance Enrollment in Paycor)
(via payroll audit)
Add HSA/FSA information into LEAP/WEX

- Mail Cobra Information to employee's home
- Forklift/MPJ Training
- Add cell number to Text EZ site
- Update Background Check Spreadsheet
- File Background Check in HR BC file
- File I9 in HR I9 file

WITHIN 30 DAYS OF EMPLOYMENT

- Follow up on benefit elections
- Add to Remodel Health
- Add to VSP

BENEFITS INFORMATION TO COVER

- Benefit Booklet
- Discuss benefits and 401k information
- Show benefits on intranet

*** MUST BE COMPLETED BEFORE FILING ***