

NEW EMPLOYEE ORIENTATION CHECKLIST

EMPLOYEES NAME: _____

JOB TITLE: _____

DATE OF HIRE: _____

DEPARTMENT: _____

MANAGER: _____

HOURS/DAY: _____

BEFORE EMPLOYEE STARTS

- ☐ Payroll Status Sheet (HR003)
- ☐ Signed Offer Letter (if applicable)
- ☐ Assign Employee PrintStream # _____
- ☐ Complete a Track-It: Provide Employee #, DOH (WO# _____)
- ☐ 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. Update PrintStream.
- ☐ MVR – (Drivers, Sales, Executives, etc.)
- ☐ Background check
- ☐ Signing Bonus _____

MEET WITH EMPLOYEE

- ☐ Employee Application (HR001)
- ☐ W-4 Tax Withholding
- ☐ W-4A MN 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 Disclosure - ENPOINTE notice of Practices-HIPAA
- ☐ Emergency Contact Form (HR013)
- ☐ Confidentiality Form (HR061)
- ☐ Corporate User Policy
- ☐ Direct Deposit (HR008)
- ☐ Employee Handbook
- ☐ Handbook Acknowledgement Form (HR067)
- ☐ MN Employee Notice
- ☐ Who's New (HR012)
- ☐ IT take picture for badge and Who's New
- ☐ Go over Tobacco Policy
- ☐ 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
 - Mobile App (review Location of Legal Summaries)
- ☐ 401K Information
 - Eligibility Letter
 - Beneficiary Form
 - Summary Plan Description
- ☐ Show benefits area on intranet

AFTER MEETING WITH EMPLOYEE

- ☐ Set up in Payroll (Paycor) (Todd)
- ☐ Add to "Hours Spreadsheet" (Todd)
- ☐ Add to Fidelity (Todd)
- ☐ Forklift/MPJ Training Required?
- ☐ Insurance Forms Returned (Insurance Enrollment in Paycor) (Todd via payroll audit)
- ☐ Mail Cobra Information to employee's home Spouse? Y/N Date Mailed: _____
- ☐ Update Background Check Spreadsheet
- ☐ Add to WEX
- ☐ Manager orientation by HR Manager
- ☐ Give copy of offer letter to VP of Finance if Sales
- ☐ Add Paycor # to PrintStream under Payroll No.
- ☐ Add cell number to Text EZ site

*** MUST BE COMPLETED BEFORE FILING ***