

# NEW HIRE ORIENTATION CHECKLIST

Name: \_\_\_\_\_  
Position: \_\_\_\_\_  
Manager: \_\_\_\_\_  
Start Date: \_\_\_\_\_  
90 Day Probation Period Until: \_\_\_\_\_  
Submission of Benefit Due Date: \_\_\_\_\_  
Benefit Effective Date: \_\_\_\_\_  
Exempt? YES NO \_\_\_\_\_

## *Before the First Day*

- |   |   |
|---|---|
| <input type="checkbox"/> Employment Application | <input type="checkbox"/> Strengths Assessment |
| <input type="checkbox"/> Employees Resume       | <input type="checkbox"/> Offer Letter         |
| <input type="checkbox"/> Background Check       |   |

## *First Day with HR*

- |  |  |
|--|--|
| <input type="checkbox"/> W-4 Form                  | <input type="checkbox"/> Non-Disclosure    |
| <input type="checkbox"/> I-9 Form                  | <input type="checkbox"/> Direct Deposit    |
| <input type="checkbox"/> Driver's License/ SS Card | <input type="checkbox"/> Employee Handbook |

## *Administrative Procedures*

- |  |  |
|--|--|
| <input type="checkbox"/> Paydays             | <input type="checkbox"/> Office Supplies             |
| <input type="checkbox"/> Telephones          | <input type="checkbox"/> Computer Logon/ Email Setup |
| <input type="checkbox"/> Key/ Building Hours | <input type="checkbox"/> Mail/ fedex                 |
| <input type="checkbox"/> Parking             | <input type="checkbox"/> Tour                        |

## *Benefits*

- |  |  |
|--|--|
| <input type="checkbox"/> Medical                           | <input type="checkbox"/> Accident Insurance                      |
| <input type="checkbox"/> Dental                            | <input type="checkbox"/> Life and AD&D Insurance                 |
| <input type="checkbox"/> Vision                            | <input type="checkbox"/> Short Term and/ or Long Term Disability |
| <input type="checkbox"/> FSA, HRA etc...                   | <input type="checkbox"/> 401(k) or Other Retirement Plans        |
| <input type="checkbox"/> Employee Assistance Program (EAP) |  |



# *Policies to Review in Employee Handbook Before Signing*

- Alternate Dispute Resolution (ADR)
- Workplace Violence
- Discrimination
- Attendance/ Work Schedule
- Holidays & PTO Accruals
- Conduct/ Correction
- Overtime/ Meal Breaks
- Dress Code
- Workers' Compensation
- Open Door/ Problem Solving
- Confidentiality
- Visitors
- Email/ Social Media/ Network
- Travel
- Drug and Alcohol Testing
- Company Property & Equip.

## *Follow-Up for HR*

- Benefits Information (sent to employee)
- Handbook Acknowledgement Form
- Benefits Forms (received from employee)
- Benefits Faxed to Carrier
- Benefits Back Billing
- 401(k) packet
- Other Applicable

