# New Team Member Checklist

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| **EMPLOYEE INFORMATION** | | | | | | | | | | |
| **Name**: | | | | | Start Date: | | | | | |
| Position: | | | | | Manager: | | | | | |
| **FIRST DAY** | | | | | | | | | | |
| Provide employee with New Employee Guidebook or related materials (as applicable).  Assign "buddy" employee(s) to answer general questions. | | | | | | | | | | |
| **POLICIES** | | | | | | | | | | |
| Review key policies. | * Anti-harassment * Vacation and sick leave * FMLA/leaves of absence * Holidays * Time and leave reporting * Overtime * Performance reviews * Dress code | | | | | | * Personal conduct standards * Progressive disciplinary actions * Security * Confidentiality * Safety * Emergency procedures * Visitors * E-mail and Internet use | | | |
| **ADMINISTRATIVE PROCEDURES** | | | | | | | | | | |
| Review general administrative procedures. | | | * Office/desk/work station * Keys * Mail (incoming and outgoing) * Shipping (FedEx and UPS) * Business cards * Purchase requests | | | | | | * Telephones * Building access cards * Conference rooms * Picture ID badges * Expense reports * Office supplies | |
| **INTRODUCTIONS AND TOURS** | | | | | | | | | | |
| Give introductions to department staff and key personnel during tour. | | | | | | | | | | |
| Tour of facility, including: | | * Restrooms * Mail rooms * Copy centers * Fax machines | | | * Bulletin board * Parking * Printers * Office supplies | | | * Kitchen * Coffee/vending machines * Cafeteria * Emergency exits and supplies | | |
| **POSITION INFORMATION** | | | | | | | | | | |
| Introductions to team.  Review initial job assignments and training plans.  Review job description and performance expectations and standards.  Review job schedule and hours.  Review payroll timing, time cards (if applicable), and policies and procedures. | | | | | | | | | | |
| **COMPUTERS** | | | | | | | | | | |
| Hardware and software reviews, including: | | | | * E-mail * Intranet | | * Microsoft Office System * Data on shared drives | | | | * Databases * Internet |

### New Hire Paperwork & Orientation Checklist

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| --- | --- | --- | --- |
| **Employee Name:** |  | **Date of Hire:** |  |
| **Position Title/Role:** |  | **Reports to:** |  |

|  |  |
| --- | --- |
| **Completed:** | **To be Completed / Filed** (as applicable and appropriate to position) |
|  | Application Form (and resume & references if applicable) |
|  | Authorization and Release for Background Check |
|  | Satisfactory Background Check Complete (notification from Diocese) |
|  | Verification of degrees, licenses or certificates if applicable |
|  | INS Form I-9 and documentation |
|  | Ohio State Taxes & new Employee Information (as needed) |
|  | Other state or city tax related forms (as necessary) |
|  | IRS W-4 – Tax Deduction forms |
|  | Automatic Paycheck Deposit Form, if applicable |
|  | Benefit enrollment forms, as applicable  - Medical  - Dental  - Vision Service Plan  - 403(b)  - Pension Plan  - Life Insurance  - Employee Assistance Program  - Short Term Disability Plan  - Long Term Disability Plan  - Worker’s Compensation |
|  | Diocese to record employee in appropriate database(s), especially for *Safeguarding Online*™ training. |
|  | All employees and volunteers with the Diocese must complete assigned Safeguarding Online ™ courses within 90 days of hire or engagement. Failure to comply with this requirement can result in suspension. |
|  | Signed acknowledgement receipt for policies, e.g.: any Personnel Manual; Letter of Agreement (LOA), etc. |
|  | Other: Email and phone extensions assigned |
|  | Other: |
|  | Other: |
|  | Other: |
|  | **Information Given to New Employee** |
|  | Job Description and Letter of Agreement (LOA) |
|  | Personnel Policy Manual |
|  | Benefit information |
|  | Payroll information, e.g.: pay days, deductions, time sheets |
|  | Work Schedule |
|  | Provide keys, and information regarding building use |
|  | (Provide security alarm code, and information on setting and turning off alarm and contacting the security co.) |
|  | (Provide and review any Emergency Plan) |
|  | Review telephone, fax and email procedures and policies regarding usage |
|  | Provide internal staff phone extension list and appropriate directories |
|  | Orientation during first week may include but not limited to:  - Review of Personnel Policy Manual  - Discuss organizational structure and review interrelationships with other ministries / programs  - Basic tour of organization and introductions to other staff members  - Review front desk & mail/copy & supply room procedures  - Review Records Management Program |

Note(s):