# 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
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| **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
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### 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):