



New Team Member Checklist

EMPLOYEE INFORMATION			
Name:		Start Date:	
Position:		Manager:	
FIRST DAY			
<input type="checkbox"/> Provide employee with New Employee Guidebook or related materials (as applicable).			
<input type="checkbox"/> Assign "buddy" employee(s) to answer general questions.			
POLICIES			
<input type="checkbox"/> Review key policies.	<ul style="list-style-type: none"> • Anti-harassment • Vacation and sick leave • FMLA/leaves of absence • Holidays • Time and leave reporting • Overtime • Performance reviews • Dress code 	<ul style="list-style-type: none"> • Personal conduct standards • Progressive disciplinary actions • Security • Confidentiality • Safety • Emergency procedures • Visitors • E-mail and Internet use 	
ADMINISTRATIVE PROCEDURES			
<input type="checkbox"/> Review general administrative procedures.	<ul style="list-style-type: none"> • Office/desk/work station • Keys • Mail (incoming and outgoing) • Shipping (FedEx and UPS) • Business cards • Purchase requests 	<ul style="list-style-type: none"> • Telephones • Building access cards • Conference rooms • Picture ID badges • Expense reports • Office supplies 	
INTRODUCTIONS AND TOURS			
<input type="checkbox"/> Give introductions to department staff and key personnel during tour.			
<input type="checkbox"/> Tour of facility, including:	<ul style="list-style-type: none"> • Restrooms • Mail rooms • Copy centers • Fax machines 	<ul style="list-style-type: none"> • Bulletin board • Parking • Printers • Office supplies 	<ul style="list-style-type: none"> • Kitchen • Coffee/vending machines • Cafeteria • Emergency exits and supplies
POSITION INFORMATION			
<input type="checkbox"/> Introductions to team.			
<input type="checkbox"/> Review initial job assignments and training plans.			
<input type="checkbox"/> Review job description and performance expectations and standards.			
<input type="checkbox"/> Review job schedule and hours.			
<input type="checkbox"/> Review payroll timing, time cards (if applicable), and policies and procedures.			
COMPUTERS			
<input type="checkbox"/> Hardware and software reviews, including:	<ul style="list-style-type: none"> • E-mail • Intranet 	<ul style="list-style-type: none"> • Microsoft Office System • Data on shared drives 	<ul style="list-style-type: none"> • Databases • Internet

New Hire Paperwork & Orientation Checklist

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 <ul style="list-style-type: none"> - 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 <i>Safeguarding Online™</i> 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: <ul style="list-style-type: none"> - 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):