

NEW EMPLOYEE CHECKLIST (document #1)

NAME: _____ HIRE DATE: _____

DEPT: _____ TITLE: _____

Prepare ahead – Create employee folder, assemble the following:

- A. Employment application (&/or resume)
 - B. Interview Questions
 - C. Tests & Quizzes
 - D. Organization chart
 - E. Job description
 - F. Envelope for employee paperwork
 - G. (Hourly employees) Clock-in instruction
 - H. Policy Manual
 - I. Safety Manual
 - J. **FORM:** Acknowledgement (policy & safety manuals)
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- 2. **Notice: DLSE-NTE** “Notice To Employee”
 - 3. **Form: Status change**
 - 4. **Form: Direct deposit** (checking/saving)
 - 5. **Form: Confidential personnel record** /emergency contact information
 - 6. **Form: Employee profile (assign emp#)**
 - 7. **Form: I-9**
 - 8. **Form: W-4**
 - 9. **Salary sheet**
 - 10. **Notice: Affordable Care Act**
 - 11. **Background** checks & pre-employment tests
 - 12. **Attendance record**
 - 13. **Brochure: “Disability Ins. Provisions”** DE 2515
 - 14. **Brochure: Sexual harassment** DFEH-185
 - 15. **Notification: Workers Comp Employee Notification of Rights**, including **MPN Acknowledgement DWC Form 9783** or alternative WC carrier form
 - 16. **Brochure: “Facts about Worker’s Comp”**
 - 17. **Pamphlet: Paid family leave pamphlet** DE 2511

MEDICAL:

- I. **COBRA** “Notice of Rights Re: Continuation of Health Benefits Coverage”
(Cobrahelp currently sends this on behalf of INSCO)
- II. **Ins. Packet – health enrollment form**
- III. **Ins. Packet – dental/vision/life/LTD/STD enrollment form**
- IV. **Life Insurance enrollment form**

EMPLOYEE ID NUMBERS (obtain before entering into payroll system):

Worker's Comp Code: _____ File # _____
Employee Profile ID (see Employee Profile Notebook): _____
Employee ezLabor ID (see last hire # in ezLabor): _____
ADP file #: _____ Home Department: _____
User ID: _____ Password: _____
Supervisor: _____

Take these steps with applicant

- DLSE-NTE** "Notice To Employee" (**Discuss & obtain signature**)
- Job Description & Org Chart**– provide copy
- CLOCK-IN Instructions** – fill out form, provide to employee
- Employee Handbook** – obtain signature: acknowledgement of receipt
- Safety Handbook:** Review handbook AND **obtain signature:** acknowledgement of receipt
- Form:** EMPLOYEE STATUS CHANGE (obtain signatures)
- Direct Deposit** – obtain voided check (not deposit slip) + form **discuss prenote**
- Collect:** ADDITIONAL INFO NEEDED FOR CONFIDENTIAL PERSONNEL RECORD
- Form:** I-9
- Form:** W-4
- Brochures:** SDI, sexual harassment & W.C.
- PARKING**
- Intranet & timecard system access (holidays, forms, etc.)**
- 401K plan** (and rollover) (eligible in **April or Oct after 6 mo. Anniversary**) **discuss match**
- Provide:** Info: health/dental/vision - rates/pre-tax (following 1 mo), life (3 mo),
- Insurance** pre-tax agreement
- Affordable Care Act** – provide info re: exchanges & obtain signature
- Forms:** COBRA Form + PAID FAMILY LEAVE Form
- Discuss:** Life Ins: ee to complete form within 2 days. Enter online when received.
- Discuss:** STD/LTD eligible on exact date of 3 month anniversary
- Obtain:** EMPLOYEES INITIALS FOR Q.C.

Complete these items after applicant begins work:

Set Up Employee in Computer Systems:

- Assign: user ID _____ Password _____
- TIMECARD SYSTEM: Enter employee into ezLABOR
- PAYROLL SYSTEM: Enter employee into ADP
- COMPUTER SYSTEM: E-mail request To DP to activate (provide name (include middle initial) and a preferred password – also ask to assign a number for new C&M ee’s)

Complete set-up:

- E-Verify** same day ee begins work
- I-9** - Fill out employer section of I-9 form
- ADP** – ENTER EMPLOYEE INFO. IN ADP
- ezLabor** – ENTER EMPLOYEE INFO. IN ezLabor

- DIRECT DEPOSIT** (file form & ck in bottom drawer, set up in ADP, update emp profile)
- ATTENDANCE RECORDS** (create & file)
- COBRA**: Enter ee information into www.mycobrahelp.com
- SALARY SHEET** (Create & file top left cabinet) (hourly-monthly-yearly amts)
- EMPLOYEE LISTS:**
 - Address list** M:excel:address.xls
 - Employee List** M:winword:lists:emplist20xx.doc
 - Org Chart** M:winword:org chart-month-yr.doc
 - B-day (doc)** M:winword:Birthdays:Birthdays.doc
- E-MAIL ORG CHART CHANGES** to Mark
- FILE I-9 AND ID INFO IN SEPARATE FILES** (top left file cabinet)
- Health Ins. – ADD ee online** (the system automatically enrolls them when eligible)
- Dental/vision – ADD ee online** (the system automatically enrolls them when eligible)
- REMINDER on calendar: health/dental/vision payroll deductions**
- Update document “Insurance Deduction Table” in WORD, place in training manual**
- Proof of Auto Insurance** (for outside sales only)