**Add logo here

New Employee Checklist**

|  |  |  |  |
| --- | --- | --- | --- |
|  |  |  |  |
| **Employee name** | **DOB** | **Hire date** | **Manager** |

**Completed Employee Forms**

[ ]  Application form

[ ]  Curriculum vitae or resume

[ ]  Job description

[ ]  Handbook and Handbook Acknowledgement Form

[ ]  Confidentiality Agreement

[ ]  Form I-9

[ ]  Form W4 – Federal

[ ]  Form W4 – State

[ ]  Direct Deposit Authorization

[ ]  Voided check or photocopy

[ ]  Proof of address (driver’s license or state ID)

[ ]  Proof of citizenship or immigration status (Birth Certificate, passport, green card, etc.)

[ ]  Social Security Card

[ ]  Educational credentials (diploma, GED, certifications or licenses)

[ ]  Immunization records

[ ]  HIPAA training

[ ]  OSHA training

[ ]  One or two references with contact information

**FOR OFFICE USE ONLY**

[ ]  New employee hire forms (filled out by hiring individual)

[ ]  Background check

[ ]  Reference check

[ ]  Payroll account and pay schedule

[ ]  Active directory and computer login

[ ]  Merchant processing login

[ ]  Time clock login

[ ]  EMR login

[ ]  Key Receipt Acknowledgement

[ ]  Benefits enrollment

[ ]  Employee orientation

[ ]  90-day performance review and probation period

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