

Checklist for New Employees

Employee Name: _____ Title: _____

Status: Exempt Non-Exempt
 Full-Time Part-Time Temporary Seasonal

Federal and State Forms

- Form W-4
- State Withholding Allowance Form
- Form I-9

Job-Specific Information

- Introduction to the job
- General performance expectations (e.g., productivity)
- Written job description
- Procedures manuals (if applicable to job)
- Work rules

Introduction to Work Area

- Workstation, cubicle, office location
- Supervisor, manager, key co-workers and support personnel and their locations
- Lockers or other areas for personal items
- Cafeteria, vending machines, nearby food service
- Copier, fax, printer, other shared office equipment
- Storage closet, cleaning supplies, tools and equipment (if applicable)
- Supplies, mail, message board, sign-in and sign-out,
- Emergency exits, fire stairs, post-exit meeting area
- Parking, including restrictions
- Building hours, work schedule, lunch and breaks

Employee Identification

- Security cards, office and building keys
- Credit and gas cards
- Cell phone

Phone & Communication System

- Phone number, access code for messages, Introduction to phone system, message recording & retrieval, making calls
- Phone policies

Computer System

- Log-in, password, procedures for logging in and out, remote access
- Introduction to Outlook, messaging, calendar, address book
- Contact for computer related questions

Compensation & Reimbursement

- Time sheets/payroll procedures
- Leave requests - procedure
- Mileage & other expense reimbursements
- Employee handbook and any documents explaining employee benefits; forms for health insurance, 401(k) enrollment, life insurance, etc.