



Employee Orientation Checklist

Here is a sample list of materials a new employee should be given. It is also a good idea to review these once a year in an all-staff meeting or to set aside time in each staff team to review the Employee Handbook, and to review any changes to Procedures and Forms.

Personal Information and Enrollment Forms (*Documents to be kept in individual confidential Personnel File; employee has access to these.)

1. Offer letter stating the title, start date and compensation offered.*
2. Emergency notification - have a form requesting the name, address, telephone numbers for any person(s) to be contacted in an emergency.*
3. IRS Form W-4 - all employees must complete this form for tax withholding. This should be reviewed annually or they can change at any time if the employee's deductions change. *
4. Employee Benefits Enrollment - if you provide benefits such as health insurance, life insurance or pension plan, the employee should sign up and the employer should provide all relevant documents and Plan Descriptions. *
5. INS Form I-9 - this form is required by the US Immigration and Naturalization Service to demonstrate the right to work. (Note: The I-9 should be kept separate from other personnel records in one file for all employees.)

Give them a copy of the Personnel Manual or "Employee Handbook". Have them sign acknowledgement form and highlight important sections. (Some may be separate documents for signature.)

6. Values of the organization, Standards of Practice and Code of Ethics
7. Confidentiality agreement - employees need to maintain confidentiality while working for the agency and the employer should have a form or highlight this section in the Employee Handbook and include this in the acknowledgement form.
8. Violence in the Workplace Policy and Procedures Manual
9. Anti-sexual Harassment Policy
10. Drugs and Alcohol in the Workplace Policy
11. Equal Employment Policy and statement concerning diversity
12. Conflict of Interest Policy

13. Guidelines for Use of Technology in the Workplace and Privacy Issues in the Employee Handbook

14. Grievance procedure

Compensation

15. Salary Administration Plan and Salary Schedule

16. Summary of Benefits and Holidays

17. Time Sheets for Payroll, Lobbying and Grant Reporting guidelines

Orientation to the Role and Expectations

18. Job Description for the Position *

19. Schedule for Orientation and Training plan; who are key people to meet with in the first weeks

20. Mission, Vision, Program Priorities, Goals and Objectives of the Department and for the overall organization for the current year

21. Current Work plan for at least first 3 months of the new position

22. Work Planning Template and orientation on how to fill it out and use it

23. Regular Check-ins – Set expectations about how communication will happen with the supervisor and team

24. Performance Evaluation form – sample that will be used to evaluate the employee during the probationary period, and annually. (Note: A copy of each completed evaluation will be placed in the personnel file.)*

New Employee Welcome/Orientation Kit including the following:

25. List of staff names, Suggestions on how to have meet and greet time with different staff, or a welcome lunch

26. List of Board Members, Organizational Chart

27. Tour of the office, other locations if applicable

28. Strategic Plan, Recent brochures, Campaign materials, Tour of website

29. Internal Operations Policy, Procedures, Forms and Record Keeping.

30. Media and Publicity Guidelines.

31. Organization safety and disaster plan.

32. Local and Long Distance Travel, Training and Conference Forms.

33. Petty Cash Form and other Fiscal Forms required by the organization.

34. Any other documents pertaining to the organization such as a policy on the value of collaboration and networking.

PERSONNEL FILE CHECKLIST

Place this in front of each personnel file and mark items as they are added.

Name: _____ Hire Date: _____

COMPLETED NOTES

New Hire Packet Given to Employee/Copy to File

- | | | |
|--|-------|--|
| 1. Employment Application or Resume | _____ | |
| 2. Hiring Letter | _____ | |
| 3. Job Description | _____ | |
| 4. Emergency Contact Information | _____ | |
| 5. W-4 Form (and new version if deductions change) | _____ | |
| 6. I-9 Form (file separately with all I-9s) | _____ | |
| 7. Paycheck Direct Deposit Authorization | _____ | |
| 8. Payroll Schedule | _____ | |
| 9. Summary of Benefits & Holiday Schedule * | _____ | |
| 10. Enrollment Packets* | | |
| Health Plan | _____ | |
| Dental Plan | _____ | |
| Pension Plan | _____ | |
| Other plans | _____ | |
| 11. Flexible Benefit Plan Payroll Deduction Form | _____ | |
| 12. Acknowledgement of Receipt of Employee Manual* | _____ | |
| 13. Conflict of Interest Agreement signed | _____ | |
| 14. Confidentiality Agreement signed | _____ | |

Ongoing additions to Personnel File

- | | | |
|--|-------|-------|
| ○ Probationary Period Evaluation Complete | _____ | date |
| ○ Annual Evaluations | _____ | dates |
| ○ Improvement Action Plans if applicable | _____ | dates |
| ○ Memos re: Changes to Pay Scale | _____ | dates |
| ○ Changes to Job description (new version) | _____ | |

*PART-TIME and TEMP STAFF should be oriented to specifics for their status

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|---|-------|--|
| Review Manual re: Part Time Terms & Conditions | _____ | |
| Eligibility for Benefits for Part-Time Employees | _____ | |
| Notice to Temporary Employees of Terms & Conditions | _____ | |