

Name: _____

Hire Date: _____

Note: This is an example form and should be implemented into a ticketing system.

New Hire Internal Checklist

Summary

This document serves as a method of tracking the onboarding of new hires at [Company].

The process will be tracked by printing out the checklist version of this document, checking off what employee training, accounts, and access has been created/provided.

Create a [Name of Ticketing System] ticket to link checklist and other materials (e.g. example case) together

- Distribute New Hire Checklist and Paperwork
- Add employee to [Payroll HR System]
- Add PTO accrual to [Payroll HR System]
- Add 24 hrs. Sick Time accrual to [Payroll HR System] if employee qualifies
- Report new hire information to the appropriate state
- Report new hire information to [Retirement Plan System]. (through website)
- Medical/Dental/Life/STD/FSA/DC Benefits:
 - Fax or email enrollment forms for [Medical Insurance Provider] and [Dental Insurance Provider] to provider
 - Fax/Email Life/STD enrollment form to Provider
- Add commission information from Employment Contract to Commission Spreadsheet if applicable.
- Create an employee file.
- Set Up Intranet Profile.

- Dept, Title, Location, Email, Extension (& mobile) Manager, Alternative Contact, Primary Role.
- Network Admin set up user name, email account, access requirements and Proofpoint access.
- Set up intranet access.
- Send email to Accounting with the new employee's name and mailing address for payroll labels.
- Background Check/Authorization form—if applicable
- Collect Acceptable Use Policy, Mobile Device Policy (if applicable) and NDA from employee.
- Obtain signature for completion of IT Security training

Additional Checklist for New Hires in the Field:

- Have Tech set up laptop/iPad as needed.
- Send computer/iPad to new hire.
- Order business cards & send.

Reviewer:

Reviewer Signature:

Date: