

## New Employee Checklist

Employee Name: \_\_\_\_\_

Position: \_\_\_\_\_

Start Date: \_\_\_\_\_

### Forms

- |   |   |
|---|---|
| <input type="checkbox"/> I-9                      | <input type="checkbox"/> Payroll registration                   |
| <input type="checkbox"/> W-4                      | <input type="checkbox"/> Clergy Housing Allowance<br>Resolution |
| <input type="checkbox"/> HW-4                     | <input type="checkbox"/> Emergency Contacts<br>(recommended)    |
| <input type="checkbox"/> State New Hire Reporting |   |
| <input type="checkbox"/> Insurance                |   |
| <input type="checkbox"/> Pension                  |   |

### Notification

- Notify payroll company/ church treasurer to initiate paychecks
- Optional: Announce new hire in e-Chronicle
- Optional: update website with new contact information

### Background Check

- Initiate background check. Received Final Report on: \_\_\_\_\_

### Register for Trainings

- Safeguarding God's Children. Completed on: \_\_\_\_\_
- Sexual Misconduct Prevention. Completed on: \_\_\_\_\_
- CPR (recommended). Completed on: \_\_\_\_\_
- First Aid (recommended). Completed on: \_\_\_\_\_
- Other: \_\_\_\_\_

### Provide

- |  |   |
|--|---|
| <input type="checkbox"/> Employee Handbook             | <input type="checkbox"/> Supplies                         |
| <input type="checkbox"/> Insurance information         | <input type="checkbox"/> Work contacts / directories      |
| <input type="checkbox"/> Pension information           | <input type="checkbox"/> Company credit card (if applies) |
| <input type="checkbox"/> Keys (if applicable) & Access | <input type="checkbox"/> Badge (if applies)               |

## New Employee Checklist

### Tour

- Introduce staff/leaders
- Parking
- Office supplies storage
- Office machines (copier, fax, etc)
- Emergency exits
- First aid supplies
- Kitchen/break room/restroom
- Work area (ex: desk)
- Use of phones/message system
- Mail system

### Review

- Probationary period
- Job Description
- Initial training plans and job assignments
- Performance expectations and standards
- Job schedule and hours
- Payroll timing, time cards (if applicable, and policies and procedures)
- Finances/Reimbursement procedures

### Policies

- E-mail/ internet use
- Emergency procedures/security
- Confidentiality
- Safety and security
- Personal conduct
- Dress code
- Performance review schedule
- Overtime
- Holidays
- Vacation and sick leave
- Purchase requests

### Computer Review

- E-mail
- Internet access
- Database
- Documents
- Spreadsheets
- Shared drive
- Diocesan Website

### Other

- Order business cards