

New Hire Checklist

Employee Information

Employee Name:	Employee Number:
Department:	Manager:
Date Hired:	Notes:

Prior To Start Date

Item	Action to be taken	Select
Acceptance letter	Successful candidate has signed offer of employment	<input type="checkbox"/>
	When and where to arrive	<input type="checkbox"/>
	Who to report to	<input type="checkbox"/>
	Parking information	<input type="checkbox"/>
	Pay frequency and first pay date	<input type="checkbox"/>
Staff announcement	Create staff announcement introducing new employee	<input type="checkbox"/>
Orientation/introduction plan	Set up and circulate an orientation/introduction plan to all necessary departments/individuals	<input type="checkbox"/>
Office set-up	Office space and name plates	<input type="checkbox"/>
	Furniture required	<input type="checkbox"/>
	Mail slot assignment	<input type="checkbox"/>
	Add to company's email and phone directories	<input type="checkbox"/>
Parking space	Arrange parking space if necessary	<input type="checkbox"/>
Security access	Set up new employee's access to building(s) and issue keys, alarm codes, etc.	<input type="checkbox"/>

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		<input type="checkbox"/>
IT setup	Computer/laptop, printer, including password login, BV login	<input type="checkbox"/>
	Email address	<input type="checkbox"/>
	Network access including virtual private network (VPN) if necessary	<input type="checkbox"/>
	Office phone/long distance code/voicemail activation, code, script	<input type="checkbox"/>
	Cell phone/smart phone/personal digital assistant (PDA)	<input type="checkbox"/>
		<input type="checkbox"/>
Other		<input type="checkbox"/>

Start Date and Beyond

Item	Action to be taken	Select
New Hire Package	Paperwork Package Sent & Received by Employee	<input type="checkbox"/>
Office services	Order business cards	<input type="checkbox"/>
	Phone list for Help Desk and other key contacts	<input type="checkbox"/>
	Mail slot assignment	<input type="checkbox"/>
	Intranet/library resources	<input type="checkbox"/>
Automobile/vehicle	Car allowance/reimbursement arrangements if employee using own vehicle	<input type="checkbox"/>
	Automobile/vehicle assignment/selection if provided with company car	<input type="checkbox"/>
	License plate _____	<input type="checkbox"/>
	Insurance _____	<input type="checkbox"/>
	Odometer reading _____	<input type="checkbox"/>

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	Provide logbook and detailed explanation/illustration of how to complete	<input type="checkbox"/>
Company credit card	Issue company credit card to new hire if applicable	<input type="checkbox"/>
Office supplies	Issue office supplies	<input type="checkbox"/>
	Process for ordering supplies	<input type="checkbox"/>
Safety and evacuation	First aid kits	<input type="checkbox"/>
	Fire extinguishers	<input type="checkbox"/>
	Fire and emergency marshals	<input type="checkbox"/>
	Work safety explanations and employee sign-off	<input type="checkbox"/>
	Harassment Policy	<input type="checkbox"/>
Employee Handbook	Issue employee handbook and offer explanations	<input type="checkbox"/>
	Receive employee's sign-off on employee handbook and policies	<input type="checkbox"/>
		<input type="checkbox"/>
Other		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
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		<input type="checkbox"/>
		<input type="checkbox"/>

Payroll

Item	Action to be taken	Select
Social Insurance Number (SIN)	Validate employee's SIN (If temporary 900-series, also need to check expiration date and valid working papers)	<input type="checkbox"/>
	Must be available to employer within 3 days of new hire date (subject to penalties if employee refuses)	<input type="checkbox"/>
	Do not keep photocopy due to privacy	<input type="checkbox"/>
TD1/TP1015.3-V	Receive employee completed TD1/TP-1015.3-V forms with legal name and SIN for personal tax credits purposes	<input type="checkbox"/>
Birthdate	For CPP, group benefits, company pension, RRSP	<input type="checkbox"/>
Employee address	For T4 issuance, pay statement, group benefits	<input type="checkbox"/>
Voided cheque(s)	For direct deposit and allocation of net pay (100% in one account, or split if multiple accounts are permitted)	<input type="checkbox"/>
Emergency Contact Details	New employee to provide Emergency Contact Information	<input type="checkbox"/>
Benefits enrolment/waiver forms Sun Life	Enrolment/waiver forms received for group benefits including beneficiary information (should also name a trustee if beneficiary is a minor)	<input type="checkbox"/>
MSP enrolment/waiver forms	BC employees only	<input type="checkbox"/>
CPP status	Ask for copy of CPT30 election form if employee is 65-70, in receipt of a CPP/QPP retirement pension and is electing/has elected to stop CPP contributions	<input type="checkbox"/>
Payroll set-up	Employee set up on payroll under the correct department/cost centre	<input type="checkbox"/>
Electronic pay statement authorization	Written employee authorization received for electronic pay statements if not a valid condition of employment	<input type="checkbox"/>
Electronic T4/RL-1 authorization	Written employee authorization received for electronic year-end slips	<input type="checkbox"/>

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Email Marketing	Website/Intranet Enter Employee if Applicable	<input type="checkbox"/>
	Name Plate	<input type="checkbox"/>
	Business Cards	<input type="checkbox"/>
System Entries	ADP PCPW (TD 1's, Employee Info Sheet & Sun Life Rec)	<input type="checkbox"/>
	Payroll SS	<input type="checkbox"/>
	Vacation SS	<input type="checkbox"/>
	CTEC Master List	<input type="checkbox"/>
	Directory	<input type="checkbox"/>
	Remuneration SS	<input type="checkbox"/>
	Profit Share SS	<input type="checkbox"/>
	Sun Life	<input type="checkbox"/>
	MSP	<input type="checkbox"/>
	BV	<input type="checkbox"/>
Welcome Package	Bag with Clothes etc. Sent & Received by Employee	<input type="checkbox"/>
Follow Up With Employee	3 Week – Set Reminder to call in Calendar	<input type="checkbox"/>
	3 Month – Set Reminder to call in Calendar	<input type="checkbox"/>
Notify Employee	Each Time Vacation Entitlement Changes	<input type="checkbox"/>
	When Due for Long Term Service Award	<input type="checkbox"/>
	2 Year RRSP Eligibility - Set reminder to call in Calendar	<input type="checkbox"/>
Other		<input type="checkbox"/>

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