

# NEW EMPLOYEE CHECKLIST

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Position: \_\_\_\_\_ Conducted by: \_\_\_\_\_

The following checklist items are required, and must be completed for all new employees.

## NEW EMPLOYEE FORMS (check off items as they are completed)

<input type="checkbox"/> Application <input type="checkbox"/> E-Apps updated <input type="checkbox"/> Transcripts to CSO <input type="checkbox"/> Transcripts to school  <input type="checkbox"/> Cleared by CSO	<input type="checkbox"/> Background Check Completed (see safe environment below) <input type="checkbox"/> Employment References <input type="checkbox"/> Contract or Employment Letter <input type="checkbox"/> Pre-employment Affidavit notarized
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## EMPLOYMENT ELIGIBILITY FORMS

<input type="checkbox"/> W-4 Completed	<input type="checkbox"/> I-9 Employment Eligibility Verification
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## BENEFITS REVIEW- Forms kept in ExponentHR

<input type="checkbox"/> Medical/Dental/Vision <input type="checkbox"/> FMLA/Short Term Disability <input type="checkbox"/> Supplemental Insurance <input type="checkbox"/> Life/AD&D Flexible Spending <input type="checkbox"/> DSA and FSA  <input type="checkbox"/> Paid Time Off (PTO) <input type="checkbox"/> Front Load vs. Accrual	<input type="checkbox"/> Where to Enroll in ExpHR <input type="checkbox"/> Holiday Schedule/School Calendar <input type="checkbox"/> 403(b) Plans-Mutual of America (MoA) <input type="checkbox"/> Enrollment Process in ExpHR and MoA <input type="checkbox"/> Employee/Employer contributions <input type="checkbox"/> Pay Schedule <input type="checkbox"/> Direct Deposit-completed in ExpHR <input type="checkbox"/> How to view pay stub/W-2 in ExpHR
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## POLICY REVIEW

<input type="checkbox"/> Job Description/Job Duties <input type="checkbox"/> Annual Evaluation process <input type="checkbox"/> Curriculum, Lesson Plans	<input type="checkbox"/> Work Schedule <input type="checkbox"/> Mileage Reimbursement <input type="checkbox"/> Expense Reimbursement
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## SAFETY

<input type="checkbox"/> Safety Handbook <input type="checkbox"/> Employees Guide to Worker's Comp. <input type="checkbox"/> Accident Reporting Procedure <input type="checkbox"/> Crisis Management Plan	<input type="checkbox"/> Drug Testing Policy <input type="checkbox"/> Location of First Aid Supplies/MSDS
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## School POLICIES

<input type="checkbox"/> School Faculty/Staff handout <input type="checkbox"/> Signature & Date	<input type="checkbox"/> Disciplinary Protocol/Grievances <input type="checkbox"/> Overtime Policy
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- Catholic Schools Office Handbook
- Signature & Date

- Code of Conduct/Confidentiality
- Resignation/Job Abandonment

**DIOCESE OF DALLAS SAFE ENVIRONMENT**

- Computer Systems & Internet Use Policy
- Signature & Date

- Sexual Misconduct/Safe Environment Policy
- Signature & Date

- Safe Environment Training/Video

- Diocese Social Media Policy
- Signature & Date

**ORIENTATION/TRAINING**

- New Employee Orientation
- Staff & Work Team Introduction
- Office Directory

- New Hiring Training Schedule
- Tour of School
- Used Copier & Laminator
- Parking

**COMPUTERS**

- E-mail Connection and Use
- Internet
- Website

- RenWeb/FACTS Login & Training
- Share Drives
- Overview of Exponent HR login/training

**ACKNOWLEDGMENT SIGNATURE**

I hereby acknowledge that I have received training in the above areas. I agree that if I have any questions or concerns I will contact my Principal for clarification. **I understand that I must accept or waive insurance coverage in ExponentHR within 30 days of my hire date.**

\_\_\_\_\_  
New Employee Name (Printed)

\_\_\_\_\_  
New Employee Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Administrator Name and signature

\_\_\_\_\_  
Date