

**EMPLOYEE HIRE/ORIENTATION CHECKLIST**

<b>ACTION ITEM</b>	<b>DATE COMPLETE</b>	<b>NOTES/COMMENTS</b>
<b>PREOFFER</b>		
Review job application, resume and other credentials		
Contact references		
Background check		
Schedule & hold interview		
<b>OFFER</b>		
Employment agreement/offer letter (check with counsel if giving contract)		
Verify licenses/certifications & check exclusions		
Send agreement/offer letter to employee		
Start file for new employee		
<b>POSTOFFER</b>		
Final signed agreement/offer on file		
Inform staff of new hire		
Prepare documents/items for orientation meeting: <ul style="list-style-type: none"> <li>• W-4; ILW-4; W-9</li> <li>• I-9</li> <li>• Employee handbook</li> <li>• HIPAA policy</li> <li>• OSHA policy</li> <li>• New hire benefits information</li> <li>• Emergency contact information</li> <li>• Keys, fobs, ID card forms, etc.</li> <li>• Obtain login ID and password for EHR and computer systems</li> <li>• Schedule drug testing</li> </ul>		

<p><b><u>Orientation Meeting:</u></b></p> <ul style="list-style-type: none"> <li>• Tax forms</li> <li>• Payroll forms/items</li> <li>• Personal/emergency contact</li> <li>• Review critical employee policies/handbook material</li> <li>• Review/train on OSHA and HIPAA policies</li> <li>• Provide login passwords and ID</li> <li>• Signed HIPAA/OSHA training certification form</li> <li>• Signed employee handbook form</li> <li>• Signed confidentiality agreement</li> <li>• Provide employee with employee handbook, HIPAA policy, emergency contact numbers, etc. (put in binder)</li> <li>• Walk through of office and specific job requirements of new hire</li> <li>• Introduce new hire to others</li> <li>• Obtain ID badge/scrubs, etc.</li> </ul>		
<b>FIRST DAY ON JOB</b>		
Assign "peer mentor" to help new hire with questions		
Collect any documents to be returned to you		
Update employee file with all signed and completed documents		
Confirm or schedule benefits enrollment		

Answer any questions or concerns for new employee		
<b>ONE WEEK MEETING</b>		
Meet with new employee to discuss any concerns or questions		

SAMPLE



[www.psicinsurance.com](http://www.psicinsurance.com)

**P.O. Box 9118, Des Moines, IA 50306**

If you would like to discuss a particular situation, please contact our risk management division at 1-888-336-2642 or [riskmanagement@psicinsurance.com](mailto:riskmanagement@psicinsurance.com).

©2019 PSIC NFL 9187-EHOC

This form has been provided by the law firm HeplerBroom, LLC for the benefit of Professional Solutions and its policyholders. This form should not be relied on as legal guidance as state laws vary with respect to questions that may be asked of employees, information that may be collected from employees prior to hire, etc. You are advised to consult an attorney prior to implementing this form in your practice.

