NEW HIRE CHECKLIST

**Employers:** This is a comprehensive list of requirements; remove the items that may not be applicable to your company/organization.

| **Hiring** | | |
| --- | --- | --- |
| **Item** | **Action to be taken** | **Select** |
| Determination of worker status | Working conditions examined to determine if new worker will be an employee or self-employed worker |  |
| Recruitment authorization | Authorization received to recruit for a new hire |  |
| Job description | Create job description |  |
| Job posting | Create job posting |  |
| Application forms/resumés | Applications/resumés reviewed |  |
| Interview | Prescreen candidate |  |
|  | Interview candidate |  |
| References | Obtain written permission to check references, including applicable credit, criminal, security, bondable, immigration and driver’s license verifications |  |
| Offer letter/Employment contract | employment contract |  |
|  | Benefit information (benefit package to be sent to employee prior to start date) |  |
| Hire | Hire successful candidate |  |
| Other |  |  |

| **Prior to start** | | |
| --- | --- | --- |
| Acceptance letter | Successful candidate has accepted offer of employment |  |
|  | When and where to arrive |  |
|  | Who to report to |  |
|  | Parking information |  |
|  | Pay/deduction frequency and first pay date |  |
| Staff announcement | Create staff announcement introducing new employee |  |
| Orientation/induction plan | Set up and circulate an orientation/induction plan to all necessary departments/individuals |  |
| Office set-up | Office space and name plates |  |
|  | Furniture required |  |
|  | Mail slot assignment |  |
|  | Add to company’s email and phone directories |  |
|  | Access to employee |  |
| Set up accommodations | Set up disability accommodations/modifications if necessary (**employee must inform themselves**) |  |
| Parking space | Arrange/assign parking space if necessary |  |
| Security access | Set up new employee’s access to building(s) and issue key, badge, alarm codes, etc. |  |
| IT setup | Computer/laptop, printer, including password login |  |
|  | Email address |  |
|  | Network access including virtual private network (VPN) if necessary |  |
|  | Office phone/long distance code/voicemail activation, code, script |  |
|  | Cell phone |  |
|  | Home office set-up if necessary |  |
| Other |  |  |

| **Start Date & Beyond** | | |
| --- | --- | --- |
| Company website/newsletter | Add new employee’s bio on company website (Intranet and/or Internet) and/or newsletter |  |
| Newspaper and industry announcements | Announce new hire in newspapers and/or industry newsletters if applicable |  |
| Internal communications | Candidate communicates common name for internal communication purposes |  |
| Emergency Contact Details | New employee to provide Emergency Contact Information |  |
| New Hire authorization form | Receive new hire authorization form from Human Resources or manager |  |
| TD1/TP1015.3-V | Receive employee completed TD1/TP-1015.3-V forms with legal name and SIN for personal tax credits purposes |  |
| 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 |  |
| Social Insurance Number (SIN) | Validate employee’s SIN (If temporary 900-series, also need to check expiration date and valid working papers) |  |
|  | Must be available to employer within 3 days of new hire date (subject to penalties if employee refuses) |  |
|  | **Do not keep photocopy due to privacy** |  |
| Employee address | For T4 issuance, pay statement, group benefits |  |
| Birthdate | For CPP, group benefits, company pension, RRSP |  |
| Payroll set-up | Employee set up on payroll under the correct department/cost centre |  |
|  | Employee set up for either time and attendance or as salaried employee with exception reporting |  |
|  | Employee set up in correct location for employment/labour standards |  |
| Voided cheque(s) | For direct deposit and allocation of net pay (100% in one account, or split if multiple accounts are permitted) |  |
| Electronic pay statement authorization | Written employee authorization received for electronic pay statements if not a valid condition of employment |  |
| Electronic T4/RL-1 authorization | Written employee authorization received for electronic year-end slips |  |
| Benefits enrolment/waiver forms | Enrolment/waiver forms received for group benefits including beneficiary information (should also name a trustee if beneficiary is a minor) |  |
| Pension | Enrolment/waiver forms for company pension plan/DPSP/RRSP/TFSA (If employee already contributed to another plan this tax year, watch CRA maximums) |  |
| Collective agreement information (if applicable) | Signed union enrolment |  |
|  | Dues and initiation fees |  |
| Automobile/vehicle | Car allowance/reimbursement arrangements if employee using own vehicle |  |
|  | Automobile/vehicle assignment/selection if provided with company car |  |
|  | License plate \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
|  | Insurance\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
|  | Odometer reading \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |  |
|  | Provide logbook and detailed explanation/illustration of how to complete |  |
|  | Parking space assigned to employee if applicable |  |
| Company credit card | Explain and have employee sign off on company’s expense policy/protocol |  |
|  | Issue company credit card to new hire |  |
| Employee discount card | Explain and have employee sign off on company’s discount policy |  |
|  | Issue employee discount card to new hire |  |
| Room & board | Make room & board arrangements or allocate living allowance if applicable |  |
| Travel passes/taxi vouchers | Issue plane/train travel passes/ taxi vouchers if necessary |  |
| Office services | Ergonomic Assessment |  |
|  | Additional Furniture required |  |
|  | Order business cards |  |
|  | Phone list for Help Desk and other key contacts |  |
|  | Mail slot assignment |  |
|  | Interoffice mail flow |  |
|  | Courier instructions |  |
|  | Boardroom booking procedures |  |
|  | Intranet/library resources |  |
|  | Process for ordering supplies |  |
| Office supplies | Issue office supplies for company or home office |  |
| Company information | Provide general company information to new hire including:  • Historical context  • Organizational charts  • Key departments/individuals  • Volunteer committees  • Social activities  • Community engagement  • Proximity/nearby services  • Gym, cafeteria/restaurants  • Floor plans and office map |  |
| Safety and evacuation | First aid kits |  |
|  | Defibrillating machines |  |
|  | Fire extinguishers |  |
|  | Fire and emergency marshals |  |
| Policy, education and associated sign-offs | Work safety explanations and employee sign-off |  |
|  | Acceptable use of company resources policy |  |
|  | Waste streams and environmental concerns (eg. for recycling/organic collection and paper reduction – printing double-sided) |  |
|  | Collective Social Responsibility |  |
|  | Employee Conduct |  |
|  | Diversity and inclusion acceptance/sign-off |  |
|  | Harassment Policy |  |
|  | Education policy and resources |  |
|  | Performance evaluations (goals, objectives) and talent management (tuition reimbursement) |  |
|  | Absence guidelines (peak season, holiday closures, blackout periods) |  |
|  | Executive medical exams |  |
| Employee Handbook | Issue employee handbook and offer explanations |  |
|  | Receive employee’s sign-off on employee handbook and policies |  |
| Other |  |  |

| **Payroll Setup** | | |
| --- | --- | --- |
| New Hire/Employee information change forms | Change of address |  |
|  | Change banking information |  |
|  | Name change (must match SIN card for legal purposes such as T4/RL-1 slips) |  |
| Attendance records | Regular hours, overtime, approved absences |  |
| Requests for time off | Vacation, personal days, floater days/religious observance, banked lieu time, professional |  |
| Self-serve attendance inquiries | Vacation |  |
|  | Sick |  |
|  | Personal days |  |
|  | Banked overtime/lieu time |  |
|  | Professional days |  |
|  | Summer hours |  |
| TD1/TP-1015.3-V | Electronic TD-1, link to TP-1015.3-V |  |
| CPT30 | Link to CPT30 election/revocation form |  |
| RPP/RRSP/TFSA changes | Increase to RPP/RRSP/TFSA contributions (with safeguarded maximums), or requests to decrease amounts |  |
| Automobile/vehicle logbook | Monthly online logbook entries |  |
| Other |  |  |

Employee name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Employee number: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Manager: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Date hired: \_\_\_\_/\_\_\_\_/\_\_\_\_\_