



Employee Onboarding Checklist

Below are examples of items you can use during the Interview phase and through the complete onboarding of your employees. They are listed in general order of importance. Note that can be items with * will stay in the Employee file. The employee file can be offsite, but in most states, you must grant the employee access to the file within 24 hours if they ask to see it. The I-9 ** must stay in a binder accessible by a manager or owner and must be stored securely on the premises.

Application Phase

- *Resume
- *Copy of Certifications, degrees & CPR
- *Interview Questions
- *New Hire Test
- *Audition (*written review)
- *Application (ask for this after the initial interview)

Offer Phase

- Collect and review all interview notes
- Decide on the position or level and schedule to be offered.
- *Design and send the offer letter, including the deadline for acceptance
- Include the Job Description for the position and EAN (or pay outline) with the offer letter
- *Initiate background check, and wait for results. (NOTE: this is not mandatory)
- Fill out *Employee Action Notice (EAN). Copy to the employee once hired.

Day of Hire

- *Employee New Hire Checklist
- *W-4 filled out (note you cannot help them with this)
- *EDD-DE-4 (or state tax form)
- **I-9 (Must be completed correctly and fully)
- *Complete any Payroll enrollment forms
- *Issue Handbook and Manual and any mission, vision documents
- *Employee Emergency Contact Form
- *Complete Benefit forms (if applicable)
- *Executed Agreement (if legal in your state)
- *Liability Waiver
- *Intellectual Property Acknowledgement (if applicable)
- Sexual Harassment Reporting form
- State-mandated Employee Notices (if not posted in-studio)

These forms are for informational purposes only and not for the purpose of providing legal advice. You may want to contact your attorney to obtain advice with respect to any issue or problem unique to your jurisdiction or business. The opinions and advice expressed in or through this document are the opinions of the author.

*Employee File Includes

- Application
- Resume
- Certifications
- New Hire Tests
- CPR
- Insurance (if required)
- W-4
- EDD-DE4 (or state tax form)
- Payroll Enrollment (redact bank info)
- Employee Action Notice (EAN)
- Benefit Forms
- Background Check
- Reference results
- Drug Test Results (if done)
- Signed Handbook and Manual acknowledgments
- Emergency Contact Form
- Sexual Harassment Training certificate
- Sick pay Notice to Employee
- 30/60/90/1 yr. Reviews
- Any Writeups or performance

Employee Receives

- Manuals and Handbooks. These should include any mission, objectives, or company principles.
- Training on software and policies
- Studio orientation and training
- Safety and emergency training
- Sales Training
- Sexual Harassment Training scheduled
- Bio form and pictures for the website (this is voluntary for employees)
- Receipt of Company Property (if you issue keys, alarm codes, cell phone, etc.)

Post Hire

- *Sick Pay Notice to Employee (at 90 Days or other per local laws)
- Benefits enrollment forms (if applicable)
- *90-Day Review
- *6-Month Review
- *Yearly Review
- *Any writeups or discipline discussions

Post-Employment

- *Exit Interview and survey
- Company property returned

- Keys returned
- Handoff of documentation regarding any company sponsored projects
- Codes and logins disabled (including social media)
- Remove bio and pictures from website and software, and social
- Scan web and printed materials for the employee's name or likeness and remove

After employment is over

The Equal Employment Opportunity Commission (EEOC) requires that employers keep all personnel or employment records for up to three years. If an employee was fired, their personnel records must be retained for one year from the termination date.

Under the Age Discrimination in Employment Act (ADEA), employers must keep payroll records for three years. Additionally, employers must keep on file any employee benefit plan (such as pension and insurance plans) and any written seniority or merit system for the entire period the plan or system is in effect and for at least one year after its termination.

Under the Fair Labor Standards Act (FLSA), employers must keep payroll records for at least three years. In addition, employers must keep all records for at least two years (including pay rates, performance reviews, seniority and merit systems, and collective bargaining agreements) that explain the basis for paying different wages to employees of all genders in the same establishment.

Records must be kept for seven years for any employee involved in a discrimination or harassment claim.