

Small Business HR checklist



Employee Name: _____

Date of Hire: _____



On boarding

Documentation

- Application
- W-4
- I-9
- Preemployment testing (cognitive thinking test)
- Initial training schedule
- Employee handbook acknowledgment of receipt
- Personality test
- Set up payroll including banking information
- Background check authorization form
- Drug & Alcohol testing consent form



Training

Self Paced Training Schedule (sample)

- Communicate initial training with expectations (grades)
- HIPPA certification (within 30 days)
- Orientation (computer and live)
- Policies and procedures discussion
- Office culture training
- Initial customer service training
- Phone training
- Computer system introduction for position
- Read all office manual pages for position
- Complete all curriculum lessons for position
- Follow someone in position
- After probationary period cross training can start for other positions



Employee Documentation

Ongoing HR paperwork

- Notes to file when necessary
- Complete attendance records
- Records of training
- Task Lists (daily, weekly, monthly, etc)
- Performance reviews (quarterly, semi-annual or annual)
- Written & signed Warnings as necessary
- Written and signed Write Ups as necessary
- Termination document



Notes

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