

NEW HIRE ONBOARDING CHECKLIST

Updated June 2025



EMPLOYEE INFORMATION

☐ Name: _____

☐ Position: _____

☐ Employee Type: ☐ Certified ☐ Classified ☐ Administrator ☐ Student Worker ☐

Start Date: _____ SEID # Assigned _____

I. PRE-EMPLOYMENT / HIRING APPROVAL

☐ Board approval of hire _____

☐ Offer letter sent (except for some Student Workers if seasonal)

☐ Contract

☐ Background check (fingerprint & state) cleared

☐ Drug and Alcohol Testing Consent (if required)

☐ Physical Form (if required)

☐ [I-9 Employment Eligibility Verification](#) (Section 1 & 2 completed)

☐ [E-Verify](#) verification

☐ [W-4](#) Federal withholding form

☐ [Montana state W-4 form](#)

☐ Direct Deposit form

☐ Emergency Contact form

☐ [New hire](#) reported to MT Dept of Labor

II. RETIREMENT ENROLLMENT

Certified & Administrator: [TRS Hiring Procedure](#)

☐ TRS SSN search complete

☐ TRS Handout provided

☐ TRS [Form 106](#) completed for Substitutes or Part Time Paras/Aides

☐ Montana educator license on file (if required)

Classified:

☐ PERS [Membership Form](#) completed

III. PAYROLL SET-UP

- ☐ Pay schedule provided to employee
- ☐ Payroll deductions set:
 - ☐ TRS/PERS (if applicable)
 - ☐ Health insurance
 - ☐ Dental and/or Vision
 - ☐ Flex Deductions
 - ☐ HSA Deductions
 - ☐ Additional Life Insurance
 - ☐ Beneficiary Form
 - ☐ Union Dues
 - ☐ Voluntary deductions (union dues, 403(b), etc.)
 - ☐ Additional cancer, accident or other policy deductions.

IV. BENEFITS

- ☐ Health insurance enrollment / waiver (not typical for part-time/student)
- ☐ Dental/Vision/Life/Other optional benefits (if applicable)
- ☐ FSA / HSA enrollment (if applicable)
- ☐ 403(b), 457 plans offered (full-time only)
- ☐ Additional insurance election enrollment (accident, cancer, etc)
- ☐ Benefit enrollment deadlines explained

V. REQUIRED ACKNOWLEDGMENTS

- ☐ Employee handbook receipt signed
- ☐ Collective Bargaining Agreement receipt (if applicable)
- ☐ Safety manual and Emergency plan acknowledgment
 - ☐ Building tour
- ☐ Technology Acceptable Use Policy
- ☐ FERPA / Confidentiality acknowledgment
- ☐ Title IX / Harassment policy
- ☐ Drug-Free Workplace acknowledgment
- ☐ Workers' Comp rights notice

- ☐ Board policies acknowledgment
- ☐ Mandated Reporter acknowledgment

VI. ACCESS & EQUIPMENT

- ☐ Facility keys issued & key log signed (if assigned)
- ☐ Parking Permit (if applicable)
- ☐ Badge/ID issued (if applicable)
- ☐ E-mail / system logins provided (if assigned)
- ☐ Payroll system training scheduled (if applicable)
- ☐ Time clock training (if applicable for hourly student worker)
- ☐ Device checkout

VII. TRAINING

- ☐ Bloodborne Pathogens (required if exposed or likely exposed)
- ☐ Sexual Harassment prevention (required for adults, highly recommended for students over 18, per district policy)
- ☐ Child Abuse reporting (Mandated Reporter) (depends on role)
- ☐ McKinney-Vento (Homeless Education) awareness training
- ☐ School safety & emergency procedures (required for all)
- ☐ Cybersecurity (if accessing district systems)
- ☐ Title IX training (as required per role and district policy)
- ☐ Suicide Prevention
- ☐ Reimbursement and purchasing process training

VIII. OTHER FORMS

- ☐ _____
- ☐ _____
- ☐ _____

- ☐ _____
- ☐ _____
- ☐ _____

IX. FINAL REVIEW

- ☐ All required forms completed
- ☐ All acknowledgments signed
- ☐ Benefits elected/waived & sent to carrier (if applicable)
- ☐ Payroll & retirement set up
- ☐ File reviewed & checklist signed off

Clerk Signature: _____ Date: _____

HR/Business Office Review: _____ Date: _____

NOTES FOR CLERKS:

Student Workers typically:

- DO need: I-9, W-4, Direct Deposit, Emergency Contact, DOL New Hire reporting, safety training, basic acknowledgments
- DO NOT need: TRS/PERS, benefits enrollment, most union or contract forms
- Always check with HR for any district-specific policy on student onboarding