

# NEW EMPLOYEE CHECKLIST

- Represented
- Management
- Temp

- New Hire
- Transfer In
- Temp to Perm
- Re-employ

Employee Name: \_\_\_\_\_ SSN/OR#: \_\_\_\_\_ Hire Date: \_\_\_\_\_

RDC: \_\_\_\_\_ Ben. Pkg: \_\_\_\_\_ Trans. From: \_\_\_\_\_ Initials: \_\_\_\_\_

**SCREEN**

**ACTION**

- PBEL **[PRINT]**  Check PBEL for prior state service (ensure correct retirement start date)
  
- TRANSFERS  Cloning (P071) SS# Losing Agency# Gaining Agency# date to clone (no  
Commas in-between)
- Add union dues in the next month
- Request original forms from losing Agency
- Note on OUTLOOK calendar – check PB after next Leave Accrual run
  
- P420 **[PRINT]**  Check Clearing Account  
*{For Transfers In – only 8 hrs or less of PB}*
  
- P010  Change the tax follow up flag to “N”
- Retirement Start Date \_\_\_\_\_
- Enter W-4 / W-5 information {Default: Single-0}
- PERS –Enter PERS number {when applicable}
  
- P030 **[PRINT]**  Check PERS JOB CLASS CODE for accuracy
- Check Timesheet CD (should be “2”)
- Check distribution code and cost center
- Report discrepancies to Personnel Records staff
  
- PEBB  Enter medical, dental, life & disability forms or print proof of self-enrollment
  
- P070  ASSURANT Life (if eligible, Mandatory coverage, within 30 days)
- Union Dues / Fair Share
- Electronic Deposits (Fixed deposits not to exceed 75%)
- Check for PEBB enrollments
- Misc. Deductions:
  
- P050  Insurance Return (IR)
- Enter DPT if applicable
  
- P080  Savings Bond (SVNN deduction on P070)
  
- P003  Check for forecast or enter time
  
- P435  **Temp to Perm** – Sick Leave calc. for AFSCME if hired in same classification
- Verify vacation accrual rate
- Percentage employees: verify PB is pro-rated
  
- PERS  Fax IAP form, beneficiary form and P&F Units election form to PERS
  
- MISC  P370 – Check It
- Make employee & timesheet file
- Missing forms letter sent: \_\_\_\_\_ [Put copy in file]