|  |  |  |  |
| --- | --- | --- | --- |
| **Employee Name** |  | **Hire Date** |  |
| **Auditor Name** |  | **Audit Date** |  |

# Pre-Hire

|  |  |  |
| --- | --- | --- |
| **Item** | **Source** | **Notes** |
| * Applicant Phone Screening Form or Resume | Paylocity - Recruiting |  |
| * Interview Guide | Paylocity - Recruiting |  |
| * OIG Clearance | Paylocity - Documents |  |
| * SAM Clearance | Paylocity - Documents |  |

# Pre-Orientation

|  |  |  |
| --- | --- | --- |
| **Item** | **Source** | **Notes** |
| * I9 – Form and supporting documents | Paylocity - Documents |  |
| * Verified Credentials MVR Check Clearance | Paylocity - Documents |  |
| * State Background Check Clearance   (DHS - MN; BID - WI) | Paylocity - Documents |  |

# New Hire

|  |  |  |
| --- | --- | --- |
| **Item** | **Source** | **Notes** |
| * New Employee Orientation Checklist | Paylocity - Documents |  |
| * Job Description signed and dated by Employee | Paylocity - Documents |  |
| * Medical – Hepatitis B Acceptance/Declination | Confidential Medical File (Clinical Manager) |  |
| * Medical – TB Screening & Communicable Diseases Health Screening | Confidential Medical File (Clinical Manager) |  |
| * Medical - Acceptable TB Test (2-step Mantoux, CXR, Blood test) | Confidential Medical File (Clinical Manager) |  |
| * New Hire - Relias Training | Relias |  |
| * Written Examination (HHA Only) | Paylocity - Documents |  |
| * RN Practical Skills Competency Testing | Paylocity - Documents |  |
| * 30 Day Supervisory Visit with RN | ClearCare Activities |  |

# Ongoing

|  |  |  |
| --- | --- | --- |
| **Item** | **Source** | **Notes** |
| * Annual Performance Review | Paylocity - Documents |  |
| * Annual TB Screening & Communicable Diseases Health Screening | Confidential Medical File (Clinical Manager) |  |
| * Annual Verified Credentials MVR Check Clearance | Paylocity - Documents |  |
| * Annual Education (8 hours for direct care staff and managers of direct care staff) | Relias |  |
| * Driver’s License (if applicable) | Paylocity - Documents |  |
| * Auto Insurance (if applicable) | Paylocity - Documents |  |
| * 2 Year Delegated Task Comp (HHA ONLY) | Paylocity - Documents |  |