

For your convenience, we have assembled a chart with links to forms when onboarding a new employee in California. The chart shows “Required,” “Recommended,” “Other Company/Job Specific Documents,” and “Documents for Confidential Medical File.” Where “No PDF” is noted in the chart that means that document is not included in this packet as it is unique to your company. Where the text is **blue and bold** that is a link to download the document/form. CEA members may contact an HR Advisor for additional assistance and assistance with recommended forms, some of which are available in HR Forms on employers.org.

You will also need to gather copies of the following information to retain in the new employee's personnel file:

- Driver's License (only if the employee is required to drive for their job)
- Proof of auto insurance (only if the employee is required to drive for their job)
- Form I-9 authorization documents
 - **Important Note:** Never ask an employee to bring specified documents to complete the Form I-9, you may provide them a list of acceptable documents to assist the employee.
- Direct Deposit Authorization Form Documents, if applicable

An essential part of onboarding new employees is ensuring they get a tour of the workplace and are introduced to their supervisor, coworkers and other departments. For more information on Recruiting, Hiring, and Onboarding, CEA members may access the “[Recruiting and Hiring Tool Kit](#)” on our [website](#).

CEA has also compiled all of the required New Hire forms listed below in an easy to download digital packet, available on our store: [New Hire Packet](#). If you are a CEA member, be sure to login first to get your discount!

Employee Name: _____	Employee Number: _____
Job Title: _____	Hire Date (Month/Day/Year): _____
Status: <input type="checkbox"/> Exempt <input type="checkbox"/> Nonexempt <input type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time <input type="checkbox"/> Temporary/Seasonal <input type="checkbox"/> On-Call <input type="checkbox"/> Rehire	

Required Documents

Title of Document	Location of Document	Date Provided/Completed
Form I-9 (Completed & Signed)	Download <u>here</u>	
Copies of Form I-9 Verification Documents	Form I-9 Instructions	
W-4 Employee's Federal Tax Withholding	Download <u>here</u>	
DE-4 Employee's California Withholding Allowance Certificate	Download <u>here</u>	
Report of New Employee(s) <i>It is recommended to report new employees online: https://edd.ca.gov/Payroll_Taxes/e-Services_for_Business.htm</i>	N/A	
Notice to Employee – Wage Theft Protection Act Notice (Non-Exempt Employees ONLY)	Download <u>here</u>	
New Health Insurance Marketplace Coverage A or B <i>Form for Employers that DO offer Health Insurance</i>	Download <u>here</u>	
New Health Insurance Marketplace Coverage A or B <i>Form for Employers that DO NOT offer Health Insurance</i>	Download <u>here</u>	
Employee Receipt of written IIPP Policy/IIPP training	Download <u>here</u>	
Discrimination, Harassment and Retaliation Free Workplace Policy (signed by employee)	Download <u>here</u>	
Facts About Workers' Compensation Notice <i>(Includes Personal Physician/Chiropractor Pre-Designation Form)</i>	Download <u>here</u>	
Disability Insurance Pamphlet	Download <u>here</u>	
Paid Family Leave Pamphlet	Download <u>here</u>	
Sexual Harassment Fact Sheet	Download <u>here</u>	
Survivors Right to Time Off <i>(Crime Victims Notice)</i>	Download <u>here</u>	
Workplace Know Your Rights Notice	Download <u>here</u>	
Emergency Contact Designation Form	Download <u>here</u>	
Lactation Accommodation Notice	Download <u>here</u>	
Initial Notice of COBRA Rights (if applicable)	No PDF	

Recommended Documents

Title of Document	Location of Document or n/a	Date Provided/Completed
Application for Employment	Purchase from CEA Store or use your own.	
Signed Acknowledgement of Receipt of Employee Handbook	Download here	
Personal Contact Data	Download here	
Direct Deposit Authorization	Download here	
Equal Employment Opportunity (ADA and FEHA Policy) <i>ADA applies to employers with (15+ Employees)</i> <i>FEHA applies to employers (5+ Employees)</i>	Download here	
Meal & Rest Period Acknowledgement	Download here	
Meal Period Waiver	Download here	
Employee At-Will Acknowledgement Form	Download here	
Health Benefits Deduction (if applicable)	No PDF	
Other Deduction Authorization \$_____	No PDF	

Other Company/Job Specific Documents

Title of Document	Location of Document or n/a	Date Provided/Completed (note n/a if appropriate)
Issuance/Authorization for Uniforms/Equipment (if applicable, completed and signed)	No PDF	
If liquor is sold, proof that Employee is 21 years of age (if selling), and confirm employee, or will timely receive, RBC License.	No PDF	
Commission Agreement (Required if employee receives commission as part of compensation)	No PDF	
Confidentiality Agreement (signed by employees)	No PDF	
Pre-employment Drivers' License History Notification and DMV report (if driving for the company)	No PDF	
Proof of Insurability (if driving for the company)	No PDF	
Copy of Valid Driver's License (if driving for the company)	No PDF	
Copy of Professional License/Certification (if applicable)	No PDF	
Pre-employment Reference and Background Checks (if applicable)	No PDF	

Documents for Confidential Medical File

Title of Document	Location of Document or n/a	Date Provided/Completed (or n/a if appropriate)
Pre-employment Drug Test Results (if applicable)	No PDF	
Post-offer, Pre-employment Physical Exam Results (if applicable)	No PDF	
Workers' Compensation Pre-designation Form (if completed and submitted by the employee)	No PDF	

Checklist for Minors

Title of Document	Completed / Reviewed
The school district has issued a work permit, Form No. B1-4 (Permit to Employ and Work) for the current school year, and the employer has it on file in the workplace	
The employee's work schedule complies with the hours the minor is permitted by law to work, and the number of hours that the minor is permitted to work.	
The employer has notified the workers' compensation carrier of the employment of a minor.	
The minor is paid minimum wage and overtime if applicable. (Minors typically are not allowed to work more than eight hours in a day.)	
The minor employee will not drive a motor vehicle on public highways and streets.	

The Following Items Have Been Fully Explained and/or Distributed to the New Employee

BENEFITS

SALARY AND WAGES

- Explanation of Job Duties
- Pay Rate, Pay Period, Pay Day(s)
- Payroll Deductions
- Other _____

- Insurance

- Holidays and Vacations

- Other Benefits _____

HOURS OF WORK

- Working Hours and Schedule
- Overtime Policy
- Meal and Rest Periods
- Timecards
- Attendance and Punctuality
- Other _____

POLICIES AND REGULATIONS

- Employee Handbook
- General and Safety Rules (MSDS, IIPP information)
- Miscellaneous Policies
- Miscellaneous Regulations
- Other _____

Employee Acknowledgement

I acknowledge that I have received the above orientation and required documents.

Employee's Signature

Date

Administrative Use Only	
Orientation Completed By:	Signature:
Title:	Date:

Distribution: Original to Employee Personnel File, Copy to Employee