



New Employee File Checklist

Instructions: The following documents should be maintained in an employee's confidential physical or electronic file. Employment and payroll legislation requires employers to retain most employee records for a minimum period of time following the end of employment; please refer to the legislation for exact details.

- ☐ Resume
- ☐ Interview Records/Notes
- ☐ Reference Checks/Letters of Reference
- ☐ Records relating to education, certifications, licenses
- ☐ Record of valid driver's license and insurance (where applicable)
- ☐ Background Checks (Police Records Check, Credit Checks, etc.)
- ☐ Employment Agreement (original, signed)
- ☐ Job Description
- ☐ Employee Handbook Receipt & Acceptance Form
- ☐ Agreement to Care & Return Company Assets
- ☐ Payroll Information (SIN, Void Cheque, Payroll Set-up Form)
- ☐ Overtime & Averaging Agreements (where applicable)
- ☐ Benefit Enrolment Form & Change Forms (where applicable)
- ☐ Health & Safety Policies/Manual Receipt & Acceptance Form
- ☐ Records for Health & Safety Training:
 - ✓ Health & Safety Awareness (General or Supervisor)
 - ✓ WHMIS
 - ✓ First Aid
 - ✓ Job-specific Safety & PPE Training
 - ✓ Workplace Violence & Harassment
 - ✓ Fire Safety
- ☐ Records for Accessibility Training:
 - ✓ General AODA Requirements
 - ✓ Customer Service Standard
 - ✓ Human Rights Code as it pertains to persons with disabilities
 - ✓ Job-Specific Accessibility Training
- ☐ Vacation Time and Vacation Pay Records
- ☐ Leave of Absence Records & Supporting Documentation
- ☐ WSIB Documentation & Reports
- ☐ Performance Notes & Appraisals
- ☐ Discipline Records
- ☐ Transfer, Layoff, Recall Notices
- ☐ Union membership records
- ☐ Resignation or Termination Notices, Releases, Severance Documentation
- ☐ Exit Interviews