**Employee Personnel File Checklist**

Employee Name:

|  |  |  |
| --- | --- | --- |
| ✔/Date | Document | Notes |
|  | Employee Info/Emergency Contact Info |  |
|  | IRS Tax Docs (W-4, W-9) |  |
|  | Pay & Compensation Information |  |
|  | Employment Contract/Agreement |  |
|  | Benefits Enrollment Forms/Beneficiaries |  |
|  | Child Support Order or other legal docs |  |
|  | Workers Compensation Claims |  |
|  | Termination Documents (if no longer employed) |  |
|  | Offer Letter |  |
|  | Signed receipt of Employee Handbook |  |
|  | Signed Non-disclosure Agreement |  |
|  | Job Description |  |
|  | Job Application (if applicable) |  |
|  | Resume |  |
|  | References |  |
|  | Performance Evaluations |  |
|  | Warnings and/or Disciplinary Action Orders |  |
|  | Training & Certifications |  |
|  | Educational Transcripts |  |
|  | Time Off Records |  |
|  | Goal Setting Records |  |

|  |  |  |
| --- | --- | --- |
|  | Other |  |