Employee On-Boarding Checklist

The following is a checklist for the admin team to fill out when we bring on a new employee.

Employee Name: _____   Title: _____

Phone Number: _____   Personal Email: _____

Before New Employee Arrives

☐ Offer letter sent   ☐ Benefits information email sent   ☐ Personnel file created

☐ If remote, Matt has started registration for that state   ☐ Matt knows salary

☐ Order key card   ☐ Order credit card (if applicable)   ☐ Order AmEx, activate

☐ Send proof of business cards   ☐ Order business cards   ☐ Send them prep materials

☐ Add AmEx to Open Accounts   ☐ Check Salesforce for any comments about them (and edit)

☐ Add employee to roster on DC Healthlink   ☐ Order flowers for first day

Tech

☐ Order new computer (11" for trainers, 13" for everyone else)   ☐ Set up computer

☐ Create Salesforce login   ☐ Create email   ☐ Create calendar

☐ Added to all staff events (staff meeting, holidays, PTM)   ☐ Set up Uber for Business

☐ Set up uberconference #   ☐ Share on impt google docs   ☐ Get a laptop case

☐ Added to staff@managementcenter.org list   ☐ Added to copier address book

☐ Added to other google groups where applicable   ☐ Add computer to Open Accounts

☐ Create dropbox account and sync to computer   ☐ Add their birthday to Finance/Ops cal (yearly repeat)

Tech For Trainers

☐ Verizon mobile hotspot   ☐ Personal dongle (VGA)   ☐ Personal clicker for projector

Benefits

☐ Enroll or decline medical coverage on DC Healthlink

☐ Employee enrolled or opted out of Dental/Vision and LTD ☐ Matt has tax info for payroll

☐ Matt sent over link to Vanguard form ☐ Vanguard form filled out and mailed

Print

☐ FSA form ☐ SmarTrip form (if applicable) ☐ Personnel manual ☐ W4

☐ I-9 ☐ BenefitMall enrollment form (dental, vision, LTD) ☐ State tax form

☐ Emergency contact form ☐ Forms scanned and sent to Matt, and filed

Employee needs to bring on first day

☐ Voided check ☐ Passport or other appropriate ID for I-9

Orientation - Explain

☐ All paperwork signed and collected ☐ Give them a keycard ☐ Give them AmEx

☐ Walk through computer and tech ☐ TMC vs. TMAC ☐ ReceiptMatch

☐ Reimbursements ☐ Timesheet ☐ Ask for pic and bio for website ☐ CSAs

☐ Invoicing (for practitioners) ☐ Salesforce ☐ Ask for food preferences:_____

☐ Talent list (encourage them to send candidates to JG)

If Remote

☐ Ask if they need anything else to be able to do their job (ie printer/scanner)

If in DC Office

☐ Ask what two snacks they'd like on hand ☐ Order snacks

After Orientation

☐ Scan all paperwork and save in personnel file

☐ Send BenefitMall form to Christine Pettis (pettiscm@escinsure.com)

☐ Send tax forms to Matt ☐ Set up FSA and Smartbenefits ☐ Set up acct info in BB&T

☐ Put physical paperwork in physical personnel file ☐ Add contact info to Staff Contact List

☐ Set up call for feedback with new employee in 3 weeks

Notes: _____