Onboarding Checklist

|  |  |  |
| --- | --- | --- |
| Employee Name | Position | Date of Hire |
| Supervisor | Personal Email | Company email |
| Company Phone | Personal Phone |  |

Human Resources

After verbal acceptance of offer, send an email to new hire that includes:

Welcome email with items needed for first day

Send list of acceptable I-9 verification documents to new hire

Offer letter via Right Signature

Background Check Consent Form

Drug screen form sent electronically

* Company Sponsored Benefits Overview (Health and 403B)

Company holiday, vacation and sick schedule

Create Employee File, place in file:

Signed Employment Application

Signed Offer Letter

Signed Background consent form

Background results

Drug Screen results

Resume

Other Items:

Prepare Onboarding Notebook

Set Calendar invite with agenda to office manager and hiring manager

Confirm Cell phone set up

Order name tag (after proof approved)

Order biz cards (after proof approved)

New Hire Email to Finance Team:

* Send salary specifics, start date, etc
* Cost Center time allocation: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Cost Center expense allocation:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Confirm approver of timecard: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	+ Inform finance of approver changes

Print, Review and work with new hire to complete the following:

* I-9 (within first 3 days)
* Complete E-Verify
* Federal W-4
* State W-4 (NC-4 in North Carolina)
* NC New Hire Form
* Direct Deposit enrollment form
* Voided check/copy of banking info
* Employee Information Sheet – Emergency Contact Info, etc.
* Company Property checklist and agreement
* BYOD Acknowledgement (state office team only)
* Credit card agreement (provide to Finance)
* Review Payroll Schedule (semimonthly on 5th and 20th of each month)
* Set up in Employee Navigator and send via email
* Review and have employee complete all Benefits via Employee Navigator
* Review Health Benefit Summary
* Review Retirement Plan
* Obtain Retirement plan paperwork

 Review Handbook & Policies

 Handbook Acknowledgment

 Fiscal Policy, Time & Expense and Employee Handbook location on drives

 Fiscal Policy Acknowledgement

 Explain Timesheet and expense proceed and expectations

 Signed copy of job description

HR Tasks to complete:

* Update company org chart (save a new version & date it)
* Update Website?
* Set 75 day check in with Employee

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

HR Representative Date Completed

*(File in Employee’s HR File)*

Before First Day

Administrative/Finance

* Complete IT New Hire Checklist
* Key and key fob needed? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Set up internal Phone #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
* Cell phone needed? #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
	+ Cell phone ordered
	+ OM to create Vcards with contact info in Public Folders

Technology Specifications:

* Separate Monitor Required (1 monitor unless requested)?
* Docking station needed?

Notes:

Administrative Orientation

* Issue Key, Key Fob and complete security letter to building
* Conduct tour of facilities, pointing out break room, supply room, rest room, and emergency exits
* Review Shipping/Mail process
* Review how office supplies are ordered
* Train how to use printer, fax, scanner, etc.
* Train how to use phones and set up voice mail (directions found under org docs/office info)
* Review how to log onto email, SharePoint, Intranet(s)
* Review how to find Contact info for members of CISNC
* Ensure training of Calendaring System (schedule time with employee and staff member)
* Cell phone information (number, UN and Password)
* Have employee send out contact information to team and download contacts from public folders
* Rental Car Procedures
* Travel Guidelines
* Procedure for Requisitions (purchases more than $1500)

Supervisor Orientation

* Overview of CIS by supervisor
* Present material on CIS, CIS Model and CIS Theory of Change
* Register with CIS (cisnet.net)
* Review info on CIS Website
* CIS National Email sign up?
* Review training on Check and Connect (if applicable)
* Schedule any other CIS training
* Schedule meetings with key staff
* Shadow various staff as needed
* Go over specific events that needed to be added to new hires calendar

 Provide W-4 and NC-4

Accounting/Finance

 Provide DD Info

 Provide birthdate

 New Hire Reporting form submitted

 Provide location of signed offer letter for salary specifics