

SOP: Technology Onboarding Process for New Hires

Purpose:

The purpose of this SOP is to create a standardized process for new hires to receive technology services to get them up and operational as quickly as possible.

Scope:

This SOP applies to the technology MSP, supervising managers and all newly hired employees.

Responsibilities:

MSP: Will be responsible for implementing, following, reviewing, maintaining, and updating this policy. The MSP will also be responsible for setting up accounts and systems and issuing equipment.

The supervising manager: For the new employee will be responsible for emailing the MSP when a candidate has been selected for hiring and a first day has been scheduled.

The new employee: Will be responsible for meeting with the MSP representative, taking possession of issued equipment, agreeing to the Acceptable Use Policy and confirming that all systems for their user account are working properly.

Prerequisites:

The new employee has been selected, vetted and approved through HR's hiring processes and has been given a start date.

Procedure:

- Once a hiring selection has been made and the candidate has been vetted and given a start date, the supervisor will email the MSP. The email will contain the following information:

- The name of the new employee
- Start date
- The position and user role (technical/non-technical)
- If non-technical, will the employee be hybrid or only in office
- Any non-standard folders the employee will need access to with justification (HR, accounting, etc.)
- Once the MSP representative receives the email, they will begin setting up the user accounts and issued equipment to have it all ready by the employee's start date
 - Set up of the user account and groups may be done with the Powershell script found in the MSP GitHub, or through the GUI
- If the employee is technical, they will be set up with a technical user role and issued a laptop with a docking station and two monitors to take for their home office
- If they are non-technical, but still have a hybrid job (such as a department head), they will be set up with a non-technical user role and issued a laptop with a docking station and two monitors to take for their home office
- Other group permissions may be assigned per user role (e.g. HR, accounting, etc.)
- All hybrid workers will have their work desk setup with a docking station and two monitors for when they are in the office
- Non-hybrid workers, such as receptionists, will be set up with a non-technical user role and a desktop PC will be set up at their workspace.
- If the employee will need access to specific folders or subfolders, the supervising manager should include a request for those locations with a justification (example: "employee will need access to client account folders because they will be the billing clerk"). The MSP will add those file permissions to the user account
- All technology equipment issued will be documented and signed for using the Receipt for Company Policy in Appendix A.

References:

- [Appendix A: Receipt for Company Policy form](#)

Definitions:

- MSP -- "Managed Service Provider" the tech company contracted to provide IT services to the company

- Managing Supervisor -- The supervisor who will be responsible for managing the day-to-day activities of the new employee.

Revision History:

5/16/23 -- "Technology Onboarding Process for New Hires SOP" created by Chris Bennett