**Onboarding Checklist**

**The Onboarding Checklist is a document that lays out everything hiring managers need to coordinate between receiving a signed offer and a new hire's first week at Bottom Line**. This checklist is your recipe for a smooth transition into the organization. When executed in a timely and thoughtful manner, your new employee will have everything they need to take on their new role.



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| **Checklist** | **More Context & Pro Tips** |
| Confirm that the new employee sent a copy of the signed offer to hr@bottomline.org via secure email.   * In order to guarantee that accounts and equipment will be ready by the employee's first day of work, **please ensure the signed offer is sent at least 2 weeks in advance of the employee's start date** |  |
| ASAP after the offer is signed, complete the [**New User Account Creation form**](https://forms.office.com/Pages/ResponsePage.aspx?id=81tAl_xogUaqnyBcKlJlcwkA94Gsiu1Po0bFFSwbmYZURUxLN0VDSkhRM0hDMTMyODlLTkdLVjdDOS4u).   * The more advanced notice is given, the more time the National team will have to work on account creation (*see details at right*) | **User Access:** You can expect User and Email accounts to be ready for use a few days prior the new employee’s first day of work, and for Salesforce, LastPass, Certify, Paylocity, and NonprofitReady accounts to be created **during**the employee’s first week of work. |
| **​​​​​​​​​​​​​​**Determine whose team the new employee will be on and **provide this info to HR.**​​​​​​​ | If applicable, there may be others you need to alert about a change to team structure (example: Success Advisors need to be assigned to a manager's team in Salesforce for some list views to work correctly.) |
| **The technology point person in each region will send the equipment necessary for work:**   * Computer * Cell phone (if applicable) | MA & National: Efrain NY: Yei ​​​​​​​Chicago: TBD; for now, connect with your department director |
| **Create an engaging, thorough, and customized Onboarding Plan**​​​​​​​   * **​​​​​​​**Start from the [**Core Onboarding Template FY22**](https://tbl500amory-my.sharepoint.com/:x:/g/personal/kmagdol_bottomline_org/ET4fXwzPiadMqrGXW9I94lkB9bA2SkMdb0ZHtiYR5A8ZGQ?rtime=lL5qo7Ts2Ug) * Please copy this template into your own document before editing * We recommend converting to a PDF document when you are done with the full onboarding plan to make it easier for the employee to access the links | If the new person is an advisor |
| Schedule the new hire to **attend all relevant trainings with their cohort**   * Pull up the One Bottom Line calendar in Outlook * Invite the new hire to all relevant training sessions by opening the meeting block and adding their name in the "To" row (this will require their Outlook account to be set up) - see color code at right * Work with your regional leadership team to schedule any department-, role-, and/or region-specific trainings | All trainings on the OBL calendar begin with a number; staff in Cohort 1 should only attend trainings that begin with "1" in the subject.  Color Code Key: **Purple**= Required for **all new staff** regardless of role/title/region  Red = Required for all **Access**staff Orange = Required for all **Access & Success** staff Yellow = Required for all **Success**staff |
| Send a **welcome email to the new employee,**including at least the following:   * This [**welcome document**](https://tbl500amory-my.sharepoint.com/personal/rkinerson_bottomline_org/_layouts/15/onedrive.aspx?id=/personal/rkinerson_bottomline_org/Documents/Microsoft%20Teams%20Chat%20Files/Welcome%20Deck%20for%20New%20Employees_updated%206.27.2022.pdf&parent=/personal/rkinerson_bottomline_org/Documents/Microsoft%20Teams%20Chat%20Files&ga=1), which contains important information about onboarding expectations and remote work policies * Start date and time |  |
| **Announce the new employee(s)** to the Region   * Include anyone on the National Team who will be working directly with the new employee |  |
| **Verify employment eligibility by certifying the I-9 form** via Paylocity's Onboarding feature.   * The Department of Homeland Security has relaxed the requirements for employers to review Form I-9 documents in-person. * Employees will have to present acceptable documents for employment verification. You are responsible for certifying that you have verified the documents. * Physically examine each original document to determine if it reasonably appears to be genuine and to relate to the new employee.   + During our remote work model, you may satisfy this requirement by inspecting the document(s) over video-conferencing.   + Record the document title, issuing authority, document number, and expiration date (if applicable).   + Confirm that the employee’s first day of employment is correctly shown.   + Enter your signature, title, name, and Bottom Line’s address (you can use the address for your regional office). * **The I-9 form must be certified within the first three days of employment, and must be signed and dated by the same person examining the employee’s documentation.** * Once normal operations resume, all employees who were onboarded using the above remote verification must report to the Hiring Manager [the same person who inspected Page 3 of 3 the employee’s documentation remotely] within three business days for in-person verification of their identity and employment eligibility documentation. | HR will use Paylocity's Onboarding feature to collect new hire paperwork electronically, securely, and directly from the new hire. The new hire will receive an email from Paylocity asking them to complete a number of tasks, including entering the information captured in the Employee Information Sheet, I-9, Federal W-4, and the relevant State Tax Withholding Form. Once the new hire completes the tasks, the HR team will take care of reviewing everything EXCEPT the I-9 form, which we will assign to the new hire's manager to review within Paylocity.  **New to the I-9?** [Here is the paper version of the form](https://www.uscis.gov/sites/default/files/document/forms/i-9-paper-version.pdf). The accepted documents are listed on Page 3 and you can see on Page 2 what information you will be asked to enter. |
| **Forward all relevant all-staff and holiday calendar invites** (posted on the One Bottom Line calendar) to the new employee's Outlook account | Don't forget Mental Health Half Days and Summer Fridays! |
| ***If hiring a current or past Bottom Line student:***   * Thoroughly review the new hire's current database notes: delete all notes that you do not think they should read, and/or notes that you do not think their new colleagues should have access to.   + *Note: if the new hire participated in both Access and Success, you will need to review both program records* |  |
| **Revisit and revise your onboarding plan as needed**; meet regularly with new employees to check in and check for understanding of new content/materials covered in trainings. |  |