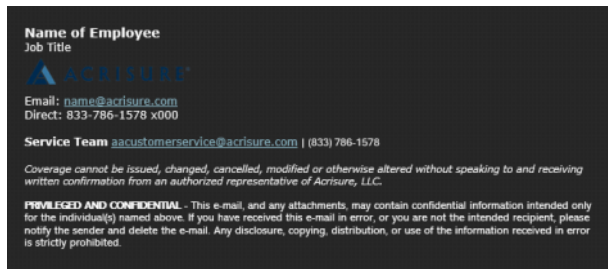


- ☐ **Laptop** - User ID and Password provided by IT
- ☐ **Outlook** - Email and password provided by IT with laptop
  - o Once you have access to Outlook remember to set up your signature line

[Link to copy and paste Email Signature template](#)



- ☐ **Outlook**- Distribution Lists that a new hire should be included in:
  - o AAS\_EBT
  - o AAS\_EB
  - o SUV\_Suvaun
  - o AAS EB
- ☐ **Outlook**- Additional inboxes that they will need added:
  - o AAS-Onboarding
  - o AAS-EB Administration
  - o ACR-Service Center
  - o SUV-Acrisure Advantages Services
- ☐ **Outlook**- Confirm that the Team calendars and PTO-AAS calendar are available
- ☐ **Teams** - Acrisure LLC Identity and Password provided by IT with laptop
  - o Confirm AAS\_EB files can be accessed under AAS\_EB Team > Shared > Files
- ☐ **OneDrive** - Acrisure LLC Identity and Password provided by IT with laptop
  - o Confirm ONEDRIVE Collaboration Shared Drive can be accessed
- ☐ **OneNote** - Acrisure LLC Identity and Password provided by IT with laptop
  - o New hire will need access to Onboarding Notebook
- ☐ **Adobe** - Acrisure LLC Identity and Password provided by IT with laptop
- ☐ **Workday** - Access via AcriWorld <https://acrisure.sharepoint.com/sites/AcriWorld>
  - o NH to complete assigned HR tasks: banking info, W4, confirm address, etc.
  - o Tasks will be assigned by Workday. NH will receive an email, tasks can also be found in Workday inbox.
- ☐ **EPIC** - Acrisure LLC Identity and Password provided by IT with laptop  
New Hire will need to register for MFA to access application - see document below along with SSO login instructions for EPIC



AcrisureLLC  
- Microsof...



SSO Login  
Instructio...



Applied  
University...

EPIC Database Name: VE61\_ACRIS03\_1\_1DS\_PROD

- ☐ **Salesforce** - <https://acrisuredigitald2c2.lightning.force.com/lightning/page/home>
- ☐ **Ease** - Login set up by **Jordyn**: jmerchant@acrisure.com or **Noelle**: ncardiel@acrisure.com
- ☐ **Suvaun** - Login set up by Rebekah Pena: [rebekah.pena@acrisuretechnology.com](mailto:rebekah.pena@acrisuretechnology.com) (Jordyn or Noelle sends Rebekah the request to set up the new hire)
  - o Explore this link: Suvaun in AcriWorld - [AcriWorld](#)
  - o Explore Suvaun Helpdesk - [Suvaun Helpdesk](#)
  - o On that page, work through the "Virtual Training" by following the link.

- ☐ **Monday.com** - Access using Outlook email address (Access is granted by Taylor Montgomery)
  - o Grant access to Acrisure Digital Transformation workspace and any necessary boards (need to be added as an owner)
  - o Monday.com Training workspace can be located and used for training materials
  - o Questions can be directed to Heather Stuk: hnstuk@acrisure.com
- ☐ **LastPass** - Email will be sent to new hire from LastPass containing username and password
  - o Bethany Lueb and Brian Lelio are admins
- ☐ **RegEd** - Email will be sent from Acrisure Licensing to new hire containing username, password and instructions
- ☐ **Mobile Device Agreement** - Mobile device agreement can be requested via a ticket to IT in the Service Portal to access Teams/Outlook from a personal phone
  - o Send to your Team Lead completed Cell Phone Stipend Form (2024) and Mobile Device Agreement
  - o Select reimbursement, highlight employee info on bill
- ☐ **Regulatory Affairs BOR Tracker** - Email Ezekiel Popoola and Lee Anderson from Reg Affairs to request access to the "Digital Policy Transfer Tracker" excel spreadsheet: eepopoola@acrisure.com, leanderson@acrisure.com
- ☐ **Concur**- This is used for expense submission.
  - o The user ID will be: (WorkdayID)@acrisurellc.com
  - o Access via <https://www.concursolutions.com/>
- ☐ **Docusign**
  - o Verify access
- ☐ **SharePoint**
  - o Acrisure LLC Identity and Password provided by IT with laptop
  - o Confirm AAS\_EB files can be accessed under AAS\_EB Team > Shared > Files <https://acrisure.sharepoint.com/sites/VEN-CTR-AcrisureAdvantageIns.Services2/SitePages/Home.aspx>
- ☐ **NICE (Phone System)**
  - o Main # 833-786-1578
  - o Your extension will be assigned by Mike Feldman, msfeldman@acrisure.com
  - o Follow this path in the One Drive to watch the training video
  - o Instructions to read while watching Training Video:
    - o [https://acrisureprod.service-now.com/sp?id=kb\\_article&sys\\_id=aa13310a97a875d0b5be78400153af08](https://acrisureprod.service-now.com/sp?id=kb_article&sys_id=aa13310a97a875d0b5be78400153af08)
- ☐ **HR items**
  - o Enroll for benefits in Workday - should receive notification to complete between start date and first pay date
  - o Questions can be directed to HR partner: **Shelley Deemter** (our AAS Dedicated HR Rep): [srdeemter@acrisure.com](mailto:srdeemter@acrisure.com)

**\*\*Questions/issues can be directed to IT by submitting a ticket via the Service Portal on AcriWorld\*\***

## Introducing IT's "Helpdesk" – The Newest IT Support Channel

**Now, there's another way for Home Office colleagues to get IT support!**

IT has launched a new "Helpdesk" – where you can call a live person directly for assistance.

**Helpdesk Hours:** Monday – Friday: 8:00 AM – 8:00 PM ET

**Contact #:** 1-877-260-5443

**Please note, no changes are being made to the other channels of support including [Support@Acrisure.com](mailto:Support@Acrisure.com) and the [Acrisure Service Portal](#).**

The following sections within the table of contents are a quick reference and items you will want to become familiar with:

<a href="#">OB Procedures References Branches</a>
<a href="#">OB Procedures References Lines of Coverage</a>
<a href="#">OB Procedures References Waiting Periods</a>
<a href="#">OB Procedures References Commonly Used Abbreviations</a>
<a href="#">OB Procedures References Carrier Contacts</a>
<a href="#">OB Procedures References Plan Funding Types</a>
<a href="#">OB Procedures References Team Roster</a>
<a href="#">OB Procedures References Policy Line Types</a>

# New Hire Job Shadowing Opportunities

Friday, July 26, 2024

11:40 AM

## 1. Systems Team

- ☐ ○ Epic Reporting
- ☐ ○ Review OneNote documentation together

## 2. Business Integration

- ☐ ○ Block Transfer initiation & beginning to walk through the process
- ☐ ○ Monday.com boards
- ☐ ○ Onboarding email address inbox
- ☐ ○ Data intake and data analysis review of driver files
- ☐ ○ Template presentations
- ☐ ○ Epic: building new groups, deactivating groups, renewing policies
- ☐ ○ Ease/Suvaun: searching groups, preparing data transfer
- ☐ ○ Project Management introduction: phrase bank, status update emails, preparing for presentations
- ☐ ○ 1:1 to learn BOR Model vs. Platform Model
- ☐ ○ PL & CL Training
- ☐ ○ Excel Training on Pivot Tables and vLOOKUPS

## 3. Account Management

- ☐ ○ AM Introductions (familiarize with team & org chart, shadow calls)
- ☐ ○ Shadow BIT working with AM's on account specific inquiries & questions
- ☐ ○ NICE Phone System
- ☐ ○ Salesforce: familiarity
- ☐ ○ Team Lead Meet & Greet & High-Level Overview of responsibilities and org. structure

## 4. Regulatory Affairs

- ☐ ○ Shadow working with the spreadsheet
- ☐ ○ Shadow BOR Tracker creation
- ☐ ○ Shadow One-Off BOR process