**Implementation Documents**

In conjunction with the schedule provided in the “Implementation Timeline,” your Implementation Consultant (IC) will review the following documents with you to complete your TriNet Implementation process.

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| **Document** | | **File** | |
| Welcome to TriNet – Implementation Guide  This TriNet Implementation guide explains the process of connecting your company and your worksite employees to our world-class technology and excellent Human Resources services. | |  | |
| Unemployment Registration Request (SUTA) TriNet’s services include handling state unemployment tax (SUTA) collection and remittance and managing claims for each state in which you have employees. Refer to this document to properly set-up or inactivate SUTA accounts. | |  | |
| General Liability Insurance  Use this template to request a certificate of insurance from your agent. Evidence of coverage must be provided no later than your first payroll reporting date. | |  | |
| TriNet Passport Roles  Overview of the TriNet Passport roles for Administrators | |  | |
| Electronic I-9 Quick Start Guide This quick start guide will assist your Company’s I-9 Authorizer with the required completion of Section 2 of the Electronic I-9s. | |  | |
| Employee Templates  Employee Welcome Letter: template to introduce employees to TriNet Services prior to your live date.  New Hire Handout: Employee quick guide detailing required new hire steps within TriNet Passport for use after your live date. | |  | |
| **Optional Implementation Documents**  **[IC – Remove rows/descriptions that do not apply]** | | **File** | |
| Retirement Plan Summary  Complete this form to set up your company’s existing retirement plan on TriNet’s system. | |  | |
| Employee Upload Spreadsheet  Provide this spreadsheet for clients with more than 20 worksite employees [refer to RFP conversion process to provide a customized upload document].  Trusted Advisor Conversion to Employee Provide this spreadsheet for a Trusted Advisor to be converted to an employee. | |  | |
| COBRA Carryover Forms  If any employees have COBRA coverage with your previous administrator, please complete the COBRA Carryover Intake Form and Fax to the number specified. The COBRA Carryover Template is provided so you may notify the employee(s) of the change from the previous administrator to TriNet. | |  | |
| GL Upload Setup Request  TriNet can provide a standard GL file that contains the core elements of a payroll journal entry. Typical turnaround for setup is 7-10 business days after receipt of attached. | |  | |
| AFLAC Transfer Forms  Submit this template to your AFLAC representative to have employee Aflac account numbers closed and transferred to the main billing account for TriNet. | |  | |
| Garnishments:  If any employees currently have garnishments, please review attached requirements and return to your implementation consultant. | |  | |
| Leave Balance Upload Spreadsheet If TriNet will track leave plan (PTO/Vacation/Sick) balances, use this spreadsheet to upload leave plan balances one day prior to company live date. | |  | |
| Online Leave Requests Please review the tutorials and guides to begin utilizing the TriNet Online Leave Request system. | |  | |
| Additional Pay/Other Deductions:  Additional Pay: Your IC will help set up recurring additional pays through TriNet Passport.  Deductions: Employees must sign applicable deduction/repay form and return two business days prior to first payroll report date. | |  | |
| **Document for Reference (no action required)** | | **File** | |
| Workers Compensation Instructions  Please refer to the attached in the event of a work related injury. | |  | |