

New Staff Person Procedure

1 New Hire Packet

- i. Offer letter or contract
- ii. Staff/Employee Manual
- iii. Sign Org. Agreements
 1. Sign Discrimination and Sexual Harassment Policy
 2. Sign Code of Ethics
- iv. Proper Tax Forms (**1-9 and W4 for employee, W9 for contractor**)
 1. Save hard copy in file cabinet
 2. Scan and upload digital to Dropbox financial
- v. Direct Deposit form if the person is an employee
- vi. Medical Emergency Form
- vii. These forms are stored in HR folders in File Cabinet
- viii. Benefits - HSA and Kaiser enrollment forms or waiver

2 First Day Orientation: Set the stage - New staff member will receive an orientation

- i. Philosophy around communication and supervision, workload and collaboration
- ii. When and how we work and meet, office culture, weekly check-ins with staff
- iii. Big picture budget and goals and where we're at
- iv. Explain their job
- v. Deeper check-ins, goals and reviews
- vi. Set up a time when all employees go out to lunch with full staff
- vii. Weekly staff meeting

3 First Day Logistics

- i. Email account set up
- ii. Asana account set-up
- iii. Salesforce explanation and user setup
- iv. Set Grasshopper extension settings
- v. Share google docs (especially hours and weekly check-in)
- vi. Set up Google calendars and invite to relevant meetings
- vii. Add to wtstaff email list and wtcore comm email list
- viii. Explain the new hire packet info
- ix. Go through existing staff policies
 1. Vacation
 2. Tracking hours
 3. Phone
 4. Reimbursements
 5. Benefits
 6. Computers

- x. Keys will be given to employee
- xi. Ergonomics
- xii. Collect all forms from hire packet

4 Basic expectations of staff

- a. Track hours weekly (see form)
- b. Use Asana to guide weekly check-in with supervisor
- c. Work hours are clear each week
- d. Answer emails in a timely manner
- e. Turn in Expense Report on time each month
- f. 90 day check-in/annual review: what this looks like

5 Employer to-do (before)

- i. Write offer letter
- ii. Print all forms out
- iii. Create role description
- iv. Get keys

b. Employer to-do (after)

- i. Scan tax forms/offer letter/contract to Dropbox and store hard copies
- ii. Scan Direct Deposit enrollment to Dropbox
- iii. Send in new employee health insurance forms
- iv. Get credit card for employee
- v. Get business cards for employee
- vi. Set up email address
- vii. Announce new employee on newsletter and website