New Staff Person Procedure

1 **New Hire Packet**
   i. Offer letter or contract
   ii. Staff/Employee Manual (does not exist yet)
   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 orie
   i. Philosophy around communication and supervision, workload and colla
   ii. When and how we work and meet, office culture, weekly check-ins wit
   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