FACES & VOICES OF RECOVERY

Onboarding Checklist

The Onboarding Checklist will guide you through training, events, and tasks specifically prepared to equip you with the tools and training you will need to be successful in your new role.

	Training	Task Title	Complete By
	Company	Create an account on the website using your work email address	Day 1
☐	Technology	Complete Technology Onboading training on our internal Wiki. Click the "My Learning Tab", and then select the "Onboarding (IT)" Course	Day 1 & 2
☐	Connections	Meet with your new manager	Day 1
☐	HR/Admin	Read & e-sign documents assigned in Paychex Flex: 1. 2022 PnP Manual 2. Non-compete & Non-solicitation agreement	Day 1
☐	Technology	Set up applications After completing tech onboarding, set up and log into applications used globally: Slack, Zoom, Calendly, Salesforce, Vonage.	Day 1 & 2

☐	HR/Admin	Review & acknowledge the following policies in Paychex Flex: 1. Computer Internet Policy 2. Social Media Policy 3. Property & Equipment Policy *After completing the property & equipment policy:* 1. Complete the Equipment Release Acknowledgement Form on the wiki	Day 2
	Connections	Meet with your Tech Buddy. Set up a meeting cadence for the next 4-6 weeks	Day 1 - 3
☐	Connections	Meet with your Work Buddy. Set up a meeting cadence for the next 4-6 weeks	Day 3
	HR/Admin	Submit head shot & Bio to IT Manager & Operations Team	Week 1
☐	Training	Review "Words Matter – Stigma & Language" Training and attend a live facilitated training (reach out to a Training Assistant to discuss available options for attendance)	Week 1
☐	Training	Review Frequently Used Acronyms Document	Week 1
☐	HR/Admin	Benefits Review Sign up for benefits within 30 days. Make this a priority to complete within week one *A meeting invite will be sent by HR for benefits review during your 2nd week*	Week 2

☐	Development	Complete the [Employee Calendar & Quarterly Check-In Guide for All Staff](#) (located in the Operations Section under the Professional Development tab).	Day 30
☐	HR/Admin	Concur Training Attending meeting or watch video training on how to track and submit expenses	Day 30
☐	HR/Admin	Review & Acknowledge [Company Travel & Expense Guidelines](#) assigned to you in Paychex Flex	Day 30
☐	Development	Professional Development Plan Create your development plan and set priorities for professional development to discuss with your manager at your Quarterly Check-In	Day 60
☐	Training	Attend an RDP Demo Contact [Jon Picard](#) to sit in on an upcoming RDP Demo	Day 60