

EMPLOYEE NAME: \_\_\_\_\_ BRANCH: \_\_\_\_\_

POSITION: \_\_\_\_\_ HIRE DATE: \_\_\_\_\_ START DATE: \_\_\_\_\_



## NEW EMPLOYEE ONBOARDING CHECKLIST

*Inform/Confirm with Branch Supervisor, Executive Management Team, Branch Operations Manager, IT Department, and HR Manager of employee's start date so that everyone is aware and on the same page*

### Employee:

*Items with a \* need to be completed employee's first 2 days*

- Offer Acceptance Letter
- OnBoarding paperwork through CU People
- Read through Employee Handbook\*
- Read through Operations Policies Handbook\*
- Sign/Acknowledge Teller Balancing Standards\*
- Sign/Understand Job Description\*
- Sign up for Intranet\*
- Write Bio/"About Me"
- Send Photo for Intranet
- Complete Annual Compliance Classes in TLC360

### Branch Supervisor:

*This portion to be completed by end of employee's first week (before Karissa arrives for training)*

- Update HelpDesk ticket with station & phone details for new employee setup
- Review Teller Balancing Standards & Job Description with employee and scan to HR
- Scan Handbook Acknowledgements (x2) to HR
- Give employee keys/fob to enter branch
- Add employee's Emergency Contact info to branch folder
- Set up teller station (ensure all equipment is working properly – PC & phone)
- Sign employee into Windows & Outlook
- Set up email signature in Outlook
- Help employee set up password spreadsheet
- Bookmark all websites into employee's favorites
- Help employee set up voicemail
- Create login for LSC PrePaid if applicable
- Give branch FIS/Co-Op login to employee
- Open savings account for employee (Choose *Employee* in CU Employee Relation Code in Forza)
- Add Employee Anniversary/Evaluation pop-up reminder to Outlook calendar

### Information Technology:

- Network User
- Email
  - o \_\_\_\_\_@connectidaho.org
- ShareFile
- Network Folder
- Office365
- Microsoft Teams on PC
- Phone Extension, Direct Line, & Handset
  - o x\_\_\_\_\_
  - o 208-\_\_\_\_\_-\_\_\_\_\_- (if applicable)
- Adobe, Browser, & Outlook Defaults
- Workstation Configuration
  - o ScanSnap
  - o ScanShell
  - o Default Printer, Check Printer, Branch Printer, Receipt Printer
- Send all employee info to Branch Supervisor, HR & Branch Experience Specialist

### Branch Operations Manager:

- TLC360 Online Training
- S: Drive Folder
- Forza: User ID \_\_\_\_ / Teller # \_\_\_\_
  - o Processing Limits
- Order Teller Stamp
- Approve Intranet access
- CardWizard
- Checks For Less
- ChexSystems
- Kasasa RED Channel
- PayPoint
- TranZact setup/approval
- Tyfone Admin Console
- Add to Contact Sheet Extensions & Emails
- Add to Teller Number List
- Add to CCU Who's Who
- Send Introduction email to all staff

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## NEW EMPLOYEE ONBOARDING CHECKLIST

*continued*

### Human Resources:

- Background Check/Bondability
- Offer Letter
- Send email to COO, EVP, Supervisor, and Branch Experience Specialist to confirm offer acceptance
- Notify IT of new hire (HelpDesk ticket)
- Make EE Folder – digital
- Add to CU People
- Add to Blue Cross/Dental/Vision on website
- Send Michelle (Universal) email for new EE
  - o Michelle sends COBRA information
  - o Record for HRA & Flex Spending
- Add accruals FT rate to CU People
- Add deductions to CU People
- Add insurance elections to CU People
- Add to PTO, Deductions, 401K spreadsheets
- Add 30-day Check-In to Outlook Calendar
  - o Include Supervisor
- PayEntry login
  - o Add EE to Supervisor
- ClockEntry login
- File all paperwork in appropriate folders (see separate HR New Hire Checklist)

### Executive Management Team:

- Give security codes for branch
- Eltropy (if applicable)
- Approve user in CUNA Mutual (lenders only)

### Accounting Supervisor:

- Approve user in Catalyst / TranZact

### Credit Manager (lenders only):

- Create logins for:
  - o Archer
  - o CarFax
  - o Cars4Sale
  - o FDI Dealer Track
  - o LenderClose
  - o NADA
  - o State National / InsurTrak

ONBOARDING CHECKLIST COMPLETION			
PERSON RESPONSIBLE	NAME	INITIALS	DATE COMPLETED
Employee			
IT Department			
Branch Supervisor			
Branch Operations Manager	Karissa Farnham		
Human Resources Manager	Shelly Kleinkopf		
Executive Management Team			
Accounting Supervisor			
Credit Manager			