



## New Team Member Checklist

### EMPLOYEE INFORMATION

Name: \_\_\_\_\_ Start date: \_\_\_\_\_  
Position: \_\_\_\_\_ Manager: \_\_\_\_\_

### FIRST DAY

- Provide employee with New Employee Manual (Financial Administrator)
- Fill out necessary paperwork. (Financial Administrator)
  - I9
  - W2
  - Direct Deposit
  - Background Check

### POLICIES

- Review key policies.
  - Vacation and sick leave
  - PTO
  - Holidays
  - Overtime
  - Performance reviews
  - Dress code
  - Loyalty Policy
  - Program Philosophy
  - Constitution
  - SMP (Strategic Ministry Plan)
  - Personal conduct standards
  - Progressive disciplinary actions
  - Confidentiality
  - Safety
  - E-mail and Internet use

### ADMINISTRATIVE PROCEDURES

- Review general administrative procedures.
  - Office/desk/work station
  - Keys
  - Mail (incoming and outgoing)
  - Shipping (FedEx, DHL, and UPS)
  - Business cards
  - Purchase requests
  - Telephones
  - Building Usage
  - Expense reports
  - Ordering Office supplies

### INTRODUCTIONS AND TOURS

- Introduce staff during tour.
- Tour of facility, including:
  - Restrooms
  - Work room
  - Fax machine
  - Copiers/Printers
  - Bulletin board
  - Parking
  - Office supplies
  - Kitchen
  - Coffee machine
  - Emergency exits and supplies

### POSITION INFORMATION

- Introductions to team.
- Review initial job assignments and training plans.
- Review job description and performance expectations and standards.
- Review job schedule and hours.
- Review payroll timing, time cards (if applicable), and policies and procedures.

## COMPUTERS

Hardware and software reviews, including:

- Email
- Database
- Outlook
- Department specific software
- Microsoft Office
- Data on shared drives
- Website
- Internet
- Location of Servers
- Troubleshooting

Servant Keeper

- Membership Manager
- Contribution Manager
- Reports for Ministry Directors
- ELCA Reports
- Church Directory

## TRAINING ON...

Master Calendar

Postage Meter

Phone System

Mailboxes

Copier

Resources

Computer

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