

# NEW EMPLOYEE & EMPLOYEE TRANSFER/PROMOTION ADMINISTRATIVE CHECKLIST

EMPLOYEES NAME: \_\_\_\_\_

JOB TITLE: \_\_\_\_\_

DEPARTMENT: \_\_\_\_\_

MANAGER: \_\_\_\_\_

START DATE: \_\_\_\_\_

## BEFORE EMPLOYEE STARTS

- ☐ Nameplate (email order to Tammy at torr@wendellsinc.com) (for Exec – all caps and add title)
- ☐ Business Cards (update Business Card List Master and order appropriate cards) (see admin manual for instructions)
- ☐ Introduction meetings
  - For Account Specialist use the New Employee Orientation Schedule form (HR-Admin drive), print and give copy of schedule to Account Specialist
  - For Sales Account Executive use Basic Training for Account Executive (SALES003), print and give copies to VP of National Sales and Account Executive
- ☐ Personalized notepads (Exec/Sales only) (see admin manual for instructions)
- ☐ Clean and set up office/cubicle (Exec/Sales/CSR only)

## DAY EMPLOYEE STARTS

Telephone Number assigned by IT (Exec/Managers/Office Employees/some production employees)

Desk # \_\_\_\_\_ Ext. \_\_\_\_\_ Cell # (if applicable) \_\_\_\_\_

- ☐ Add to intranet Company Directory Staff Members profile
- ☐ Add to printed Employee Phone Directory on HR-Admin/Admin Assist/Phones drive

### Intranet

- ☐ Add employee to Company Directory: name, title, phone number, department, photo (Photos are saved in Groups/Company Pictures/Active drive)
- ☐ Add to After Hours Directory (Production Contacts/Sales/CSRs/IT only)
- ☐ Add to IT After Hours list on IT Support page (IT only)

### PIT Trainings Production employees only

Which training is needed: P1 P7 P11 F1 F3 F4 F5 Clamp truck / Sit down forklift / Scissor lift

- ☐ Employee completes video trainings and tests Date written test(s) completed \_\_\_\_\_
- ☐ Notify trainers when employee completes video(s) Date hands-on-training completed \_\_\_\_\_
- ☐ Scan tests and save in HR-Admin/Safety PIT folder
- ☐ Enter information in PIT spreadsheet in HR-Admin/Safety PIT folder

### Quality/Safety Trainings

- ☐ Set up time for Manager to meet with employee and complete Quality Checklist (HR036)

### Office keys (Exec/Managers/Leads/IT)

- ☐ Fill out Key\_Security\_Form on HR-Admin/Administrative Assistant Files/Campus Floorplans & Keys and file in drawer
- ☐ Record key number and update floorplan on HR-Admin/Administrative Assistant Files/Campus Floorplans & Keys
- ☐ For Master Key or Server Room key - update BP Physical Key Distribution spreadsheet on SecurityProgram/BP Keys and email copy to VP of IT

### Misc

- ☐ Add employee to Manufacturer's Alliance and PIM websites (Exec/Manager only)
- ☐ Update Active Employee List
- ☐ Retrieve signed Quality Checklist (HR036) from Quality Manager
- ☐ Collect Personal Auto Insurance Coverage (HR078) form for Executives and Sales Account Executives