



LOCAL EMPLOYEE- ONBOARDING ROUTING FORM

Staff

Date

Name

Start Day

Shirt Size

Birthday

Purpose: The purpose of this routing form is to ensure new employees get onboarded & ready to work with AGM.

Each step needs to be initialed & dated when completed. By doing so you are attesting that the step is fully completed.

Initial On-boarding Steps- (HR)

	INITIAL	DATE
1. Start routing form once Job Offer is accepted	_____	_____
2. Create & Label a Yellow Pers File	_____	_____
3. Print & file resume	_____	_____
4. Print out the HireBox test results & any other tests are taken to apply for the position & file	_____	_____
5. Get with the Senior & COO before the start date & have a training plan.	_____	_____
6. Give to I.T. their name, post, senior & non-agm email address	_____	_____

11.19.2022





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7. Make sure there is a desk for the employee before the start day.

8. Make sure there is a computer ready to be set up for the employee.

IT STEPS

INITIAL

DATE

9. Create an @agmagency.com email

10. Send a welcome email

11. Add on Ringcentral

12. Add on Time Dr

13. Add on CRM

14. Add staff to the org board

15. How to use Ninja Base

16. Add on Zoom

17. Send a welcome email

18. Set up the computer for the new hire(Downloading RC, TimeDr etc)

19. Have them open a lastpass account

20. Add “unread first” settings on the email

21. Have the new hire send or take a picture to be used in the email

signature

22. Create an email signature

11.19.2022





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23 Email Kristopher the photo used for email signature regarding adding them to Our Team page (Name & Post)

New Hire Steps

INITIAL

DATE

24. Meet with the CEO

25. Read Company Culture Manual

26. Read & sign the Resignation and Two Weeks Notice Policy. (REVIEW THIS WITH OLLIE MAY NOT BE NEEDED)

27. Read & sign the Employment at Will Form

28. Read the schedule policy & pick a lunch time

29. Fill out I-9

30. Sign NCA

31. Sign NDA

32. Complete Employee Manual in the CRM

33. Do the Basic App training Checklist

11.19.2022





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HR Go over Office Rules

INITIAL

DATE

34. - 0 drug tolerance

35. - If you need to take time off you csw. - If you will be late please inform HR beforehand. You will receive a late notice.

36. Tell them they can always go to Ernesto or Juan for help or assistance

37. Add to contacts in Gmail & add to "all staff" in HR Contacts

38. Interview staff after getting through the Employee Manual

39. Educate about the Late Notice Form

40. Assign & get their senior to take responsibility for them

41. Add new staff Bday/Anniversary

42. Set a reminder 30 days after to give 2 uniform shirts

11.19.2022





LOCAL EMPLOYEE- ONBOARDING ROUTING FORM

Finance/Legal

INITIAL

DATE

43. Sign up with Gusto Payroll

44. File the Child Support Service for Employees

45. Add to AGM Staff "Salary/Payroll" Spread Sheet & mark when their
evaluation is due

46. Once complete file in the Employee's File

47. Print Signed Job Offer Letter & file - Get the pdf from Fil

I attest the above has been done with

Head of HR

Date

Approved by Ollie

11.19.2022

