New Employee Checklist (Non-Advisor)

Start Date:

Employee Name:

Employee Address:

Employee Phone:

SSN:

License Plate:

COO

Make Employee Folder in M:Drive	Background Check Results Received
Date employment Agreement Sent:	ADP-Payroll
Signed Employment Agmt Received & Filed	ADP-Benefits
Date Background Check Sent:	

Operations Manager

Add Employee to Disaster Recovery Plan	Add to Orion
Add to Phone Tree	Add to RedTail
Add to New Employee Start/Termination List	Set-up at Schwab
Add new Bison Phone # to current Vonage phone list	Set-up at TD
Set Employee up with Parking, if necessary	Set-up at Fidelity
Order Business Cards	Set up at Metric, if necessary

Ripple

Set up new email	Set -up with Print/Scan capabilities (Fax, if necessary)
Get new phone number from Vonage	Set-up folder access on SharePoint (M:Drive)
Set-up new phone	Add Signature to email
Order Computer equipment	Adobe Editor License (if necessary)

Orion

Manage Your Account: Manage Database Teams & Users

Add New User

Fidelity

Create New User ID: Copy Details of someone in similar role

Add First & Last Name

Assign G-Numbers

Print Confirmation with User ID

Charles Schwab

Submit AADF Form

Security Administration: Add New User

Add Functions under User Security Groups

Manage Existing Authentication Devices

TD Ameritrade

Send TD-VEO One User Access form to Service Team