

NEW HIRES:

Initial Phase:

- ❖ Complete Exempt or Non Exempt Offer Letter per offer details outlined by supervisor. Check with attorney if potential employee is not a PA resident for document changes/updates. Information required to complete the letter: name, address, email, title, supervisor name and title, gross annual salary, bonus (if applicable), and start date. There are two attachments to the offer letter: Confidential Information, Intellectual Property, Restrictive Covenant, and Arbitration Agreement and the Form I9. For the Confidential Agreement populate name and start date. Document requires initials on each page and signature. If not a PA resident, check with attorney on any possible issues/changes.
- ❖ President and CEO, Steven Aurand is the signer of the documents. Electronic signatures are acceptable.
- ❖ Once all are approved by Steve and sent to potential employee, request the background screening via Global HR website. Order Report, SwiftHire Request, complete the form. Potential employee receives the consent form and starts the process. Account is set up for notifications when reports are complete.
- ❖ Once everything comes back clear and documents are signed. Additional documents are sent per below.

Forms For New Hire To Fill Out: - *file originals in Permanent File except I-9:*

- ❖ ADP Direct Deposit Form
- ❖ W-4 for deductions for ADP input.
- ❖ IBC and United Concordia (see Benefits instructions)
- ❖ Hartford Life Enrollment form (see Benefits instructions).
- ❖ Have Employee sign and date the CAP Index, Inc. Handbook and any other current policies (Acceptable Use Policy, Security Policy, Addendum, Remote Work, etc.). Note these documents should be sent the first week of employment. As with the offer letter, if potential employee is not a PA resident may require an Addendum to the Handbook or the Remote Work Policy.

Set-Up:

- ❖ Security Team to create user account based on their role.
- ❖ Security Team to supply and provision computer and other equipment configured for their role.
- ❖ Security Team to set up email addresses (include new hire as part of a department, e.g. Sales Team and CAPIndex).
- ❖ Add phone, mobile, and email to master list.
- ❖ Confirm equipment is working properly
- ❖ Train the new hire on privacy and cybersecurity
- ❖ Review systems and procedures with new hire
- ❖ Review roles and accounts

New Hire Checklist:

- ❖ Create an Employee Personnel Folder on One Drive/Teams.
- ❖ Resume, Background Check, Offer Letter, Confidentiality Agreement, and any other documents go in personnel folder.
- ❖ Add Employee to attendance spreadsheet, if full-time regular.

Benefits:

IBC Personal Choice (with no Referrals), including Vision and Rx

- ❖ Have new employee fill out Enrollment Form (place copy in personnel file).
- ❖ Coverage starts the 1st day of the month following hire date, in most cases.
- ❖ Go to website: <https://www.ibx.com/login>, or email completed form to Mindy Schorr at Emerson Reid, Mindy.Schorr@emersonreid.com. Frank Donnelly, Equitable is the broker for the coverage if there are any issues frank.donnelly@equitable.com.

United Concordia Flex Comprehensive Dental Insurance

- ❖ Have new employee fill out United Concordia Enrollment Form (place copy in personnel file).
- ❖ Coverage starts the 1st day of the month following hire date, in most cases.
- ❖ Go to website: <https://www.MyBenefitBilling.com>. Add New Employee and Dependents if applicable per the Enrollment Form. Coverage is through Emerson Reid. To add/remove employees you can also send the request to service@mybenefitbilling.com. Contact Ashley Stewart for issues at Ashley.stewart1@mybenefitadvisor.com.

Hartford Group Disability & Life Insurance

Policy #866740

Phone 800-523-2233

- ❖ Have new employee fill out Enrollment Form (place copy in personnel file).
- ❖ Go to website: <https://employerview.hartfordlife.com>. Go to Participant Administration/Enroll New Employee. Complete the form and submit.
- ❖ You can also email lst.bill@hartfordlife.com. Make sure premium payment appears on the next bill.