

Welcoming and Orientation Checklist
"Beta" Version: June 2017

Please help us improve this resource by completing our brief feedback survey. <https://www.surveymonkey.com/r/checklistfdbk>

Done	Item	Explanation	Resources
New Employer			
___	EIN	Every employer needs a federal employer identification number	http://www.irs.gov/
___	Payroll tax remittance setup	Employees have taxes withheld from their paychecks	Register for withholding taxes at federal and state levels (sometimes local)
___	Personnel policies	Important to have basic policies in place	
___	Workers' Comp	Covers the congregation if anything happens to the EE	Check with your insurance company
___	Unemployment Insurance	Varies by state.	Check with your state. Are churches exempt? Do churches have the option of participating? (If not, consider your severance pay policies.)
___	UUA Insurance Plans	Be familiar with UUA insurance plans, eligibility requirements, and enrollment windows	http://www.uua.org/sites/live-new.uua.org/files/benefits_summary_chart_0517_fi nal_0.pdf
___	UUA Organizations Retirement Plan	Understand eligibility, ER and EE contributions	http://www.uua.org/finance/compensation/retirement
As position is created			
___	Employee or Indep contractor?	Most workers in our congregations are employees	http://www.uua.org/finance/compensation/finances
___	Exempt or nonexempt?	Understand Fair Labor Standards Act	http://www.uua.org/finance/compensation/finances
___	Position description	Include core competencies as well as essential functions	We will have templates available soon. Resource: When Moses Meets Aaron: http://www.uuabookstore.org/When-Moses-Meets-Aaron-P17947.aspx
Prior to 1st day			
___	Background check	Background check limits risk exposure of congregation. If not done prior to offer, make offer contingent on BG check.	Check with your insurance company for recommended providers and protocol. See www.uua.org/safe
___	Employment agreement or letter of hire	Spells out terms of the employment arrangement.	Employment agreement for anyone whose terms differ from std policies. Otherwise simple letter of hire confirming start date, starting salary, etc.

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EE = employee
ER = employer

EE knows what day/time to show up, what to bring (e.g., paperwork), where to park, whom to ask for, anything else to expect (e.g., we'll take you out for lunch)

- ___ Confirm arrangements Important for EE preparedness.

- ___ Position description Expectations are sometimes modified in the
adjustments, if applicable process of interviewing/negotiating.
- ___ Communication to staff and This is part of welcoming and making sure
cong staff know what to expect.

- ___ Housing allowance resolution A portion of the minister's salary can be
(clergy) claimed as a housing allowance, which
 reduces tax burden. Must be approved by
 official board action prior to incurring
 expenses.
- ___ Ensure paperwork, etc, ready Avoid scramble or missing pieces on 1st
day

Newsletter announcement, commun w/staff and key leaders

http://www.uua.org/sites/live-new.uua.org/files/clergy_housing_allowance_0815.pdf

Keys, onboarding materials, etc.

For first day - Welcoming

- ___ Greeter First impressions and first-day experience
 are important!
 An inviting space helps new EE feel
 comfortable and enables them to start their
 work well.
- ___ Workspace and Tech Workspace should be ready, functional, inviting: desk
 and chair, computer and phone ready, email set up.
- ___ Welcoming touches E.g., Small plant for desk, gift card for nearby coffee
 shop

Someone to greet them. someone to make sure they have what they need, incl keys, place for things, computer password, how to use phones, etc.

Onboarding - General

- ___ Basic EE info form contact and emergency info
- ___ I-9 Verifies employment eligibility
- ___ SSN
- ___ W-4 For withholding
- ___ New Hire Reporting process varies by state
- ___ Direct Deposit form if applicable

- ___ Provide EE policies Important that every EE is shown policies
 and asked to read, check for understanding.

<https://www.uscis.gov/i-9>

<https://www.acf.hhs.gov/css/resource/state-new-hire-reporting-websites>

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Onboarding - Benefits

- _____ Provide keys
- _____ *Customized first-day items*

EVERY EE eligible for voluntary salary deferrals from day one.
If already in plan, ER contributions immediately.

If new to plan and 1000 hours

- _____ Retirement Plan anticipate, mark 1-yr anniv on calendar for commencing ER contributions. <http://www.uua.org/finance/compensation/retirement>

- _____ Health Plan Give EE access to comprehensive health benefits. Anticipate 750 or more hours/year. Must enroll within 30 days of hire or qual event. OR open enrollment in Nov. Anticipate 750 or more hours/year. Must enroll within 60 days of hire or qual event. <http://www.uua.org/finance/compensation/health>

- _____ Dental Plan OR open enrollment in Nov. <http://www.uua.org/finance/compensation/group/dental>

- _____ LTD and Life Ins Must offer together. Anticipate 750 or more hours/year. Must enroll within 60 days. NO open enrollment! After 60 days, medical underwriting necessary. <http://www.uua.org/finance/compensation/group>

Orientation - first few days

- _____ Introductions Key staff and lay leaders

- _____ Review of personnel policies

- _____ Supervision and Meetings Clarity about accountability, 1-on-1 and staff meeting expectations, goals and first steps, evaluation, what to do if something's wrong

- _____ Getting things done Basic stuff to know in order to do their job how to use the copier, how to reserve space, etc., newsletter frequency and submission deadlines

- _____ *Customized orientation items*