

Branch Onboarding Checklist for New Associates

Associate's Name	Start Date	Manager's Name	PeopleSoft ID

Supervisors, please complete the following Branch Onboarding Checklist for new associates and place this document in the associate's folder. This checklist is to remain in the associate's folder for the duration of their employment and 1 year after. If the below does not apply to the associate's position, please signify by using N/A in the initial line.

Phase 1

Phase 1 is to be completed by a supervisor before the new associate's first day. Please note that BMV User Equipment / Access Change form must be submitted at least one week prior to the associate's start date. If unable to submit computer access in this time frame, the supervisor must comment on the BMV User Equipment / Access Change form.

	Supervisor Initials	Date
<input type="checkbox"/> After clearance from HR, extend offer		
<input type="checkbox"/> Complete and submit BMV User Equipment Access Change Form		
<input type="checkbox"/> Complete and submit New User/BMV User Job Change Form		
<input type="checkbox"/> Complete BMVC Employee Requisition Form		
<input type="checkbox"/> Order name badge		
<input type="checkbox"/> Discuss parking arrangements and dress code		
<input type="checkbox"/> Inform associate to bring proper documents to complete I9 paperwork, i.e. social security card, birth certificate or credential (if applicable)		
<input type="checkbox"/> Identify a teammate, or peer coach to help train the new associate.		

I certify that all Phase 1 items are complete.

Supervisor Signature

Date

Phase 2

Phase 2 includes all of the steps a supervisor must complete during the associate's first day to ensure their new hire has the best opportunity to succeed in the Branch environment. Both the supervisor and the associate must initial each item on the checklist.

	Associate Initials	Supervisor Initials	Date
<input type="checkbox"/> Greet the associate upon their arrival and introduce to team			
<input type="checkbox"/> Tour of facility (include designated smoking area, if applicable)			



<input type="checkbox"/> Order associate name badge, discount badge and polo: Name Badge, Pride Shirt, Employee Discount Badges			
<input type="checkbox"/> Introduction to BMV mission statement, branch structure			
<input type="checkbox"/> Take associate photo for discount badge			
<input type="checkbox"/> Credential and Access Request Form, if applicable			
<input type="checkbox"/> Complete and email the following new hire paperwork to bmvhr@bmv.in.gov <ul style="list-style-type: none"> • BMV/C Records Access Use Agreement • Emergency Contact Information • Employee Handbook Acknowledgement Form • Employment Eligibility Form (I9) with supporting documents 			
<input type="checkbox"/> Complete and email the following new hire paperwork to BMVFinancepayroll@bmv.in.gov <ul style="list-style-type: none"> • Copy of Social Security Card • Payroll Direct Deposit Form • W-4 Federal Withholding Tax Form • WH-4 State Withholding Tax Form 			
<input type="checkbox"/> SPD Benefits Webinar 9:30 a.m. EST (full time only)			
<input type="checkbox"/> Discuss lunch and break schedules			
<input type="checkbox"/> Petty Cash Acknowledgment Form			
<input type="checkbox"/> Discuss cell phone usage			
<input type="checkbox"/> Discuss telephone use/etiquette/voicemail/directory			
<input type="checkbox"/> Discuss email account (if applicable)			
<input type="checkbox"/> Discuss BMV/C Branch Security Policy			
<input type="checkbox"/> Discuss Visitor Sign In/Out Procedures			
<input type="checkbox"/> Discuss emergency situations and procedures			
<input type="checkbox"/> Update Emergency Binder			
<input type="checkbox"/> Send updates for Manning Table and Monster Roster to Admin			

I certify that all Phase 2 items are complete.

Associate Signature

Date

Supervisor Signature

Date



Phase 3

Phase 3 includes all of the steps a supervisor must complete during the associate's first two weeks to ensure their new hire has the knowledge to succeed in a branch environment. Both the supervisor and the associate must initial each item on the checklist.

Help associate complete their PeopleSoft ELM Training (Workplace Sexual Harassment Prevention, OIG Ethics, IRUA and Security Awareness)

	Associate Initials	Supervisor Initials	Date
<input type="checkbox"/> Review job-specific competency model, job expectations and objectives			
<input type="checkbox"/> Discuss branch workflow and location of reference material			
<input type="checkbox"/> Discuss panic button procedures			
<input type="checkbox"/> Review agency policies and standard operating procedures			

I certify that all Phase 3 items are complete.

Associate Signature

Date

Supervisor Signature

Date

