January 9, 2023 Draft 1.5

**Sheridan Nurseries Onboarding & Offboarding Checklist**

Start Date:

Name:

Title:

Department:

Manager:

**Onboarding Checklist**

* **Please Note:** IT requires 10 working days to set up a new employee in the systems and order computer and phone equipment

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| --- | --- | --- |
| **Task** | **Responsible** | **Completed** |
| Tax Paperwork | HR |  |
| Company Announcement | HR |  |
| Employee Number | HR |  |
| Dayforce Account | HR |  |
| Compliance Training | HR |  |
| Issue SLP Discount | HR |  |
| Add to Company Directory | HR |  |
| Issue Keys / Alarm Code (HO) | Manager / Grace Williams |  |
| Order Business Cards (if reqd) | Grace Williams |  |
| Benefits Enrolment | HR |  |
| Email Address | IT |  |
| Add to Email Distribution Lists | IT |  |
| Create Email Signature | IT |  |
| Laptop/Computer/Tablet | IT |  |
| Cell Phone | IT |  |
| Send Contact Info to Grace W | IT |  |
| Create SBI Account (Nursery) | IT |  |
| Create Phoenix Account (GC) | IT |  |
| Create Proactis Account (if reqd) | Finance |  |
| Create HubSpot Account (Sales/Mkt) | IT |  |
| Add to Teams Channels | Manager |  |
| Assign Clerk Number (GC) | IT |  |
|  |  |  |

**Offboarding Checklist**

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| --- | --- | --- |
| **Task** | **Responsible** | **Completed** |
| Company Announcement | HR |  |
| Govt Paperwork (ROE) | HR |  |
| Deactivate Employee Number | HR |  |
| Deactivate Dayforce Account | HR |  |
| Remove from Company Directory | HR |  |
| Deactivate SLP Discount | HR |  |
| Cancel Benefits Enrolment | HR |  |
| Deactivate Email Address | IT |  |
| Remove from Email DLs | IT |  |
| Return Laptop/Computer/Tablet | HR / Manager |  |
| Return Cell Phone | HR / Manager |  |
| Return Keys / Deactivate Alarm Code | Manager / Grace Williams |  |
| Deactivate SBI Account | IT |  |
| Deactivate Phoenix Account | IT |  |
| Deactivate Proactis Account | Finance |  |
| Deactivate HubSpot Account | IT |  |
| Deactivate Clerk Number (GC) | IT |  |
|  |  |  |

**Notes:**

Sheridan wi-fi passwords:

SNwireless – Sheridan1913

SN\_Guest -- Sheridan