



Swartz Contracting On Boarding Program



ADMINISTRATIVE PERSONNEL - ACCOUNTING/HR

| TRAINING | MODULE | TIME FRAME | DATE OF COMP | INITIALS | COMMENTS |
|-----------------------------|-----------------------|------------|--------------|----------|----------|
| Phase I - HR/INITIAL HIRING | | | | | |
| ORIENTATION | | | | | |
| -HR Paperwork | SEI Process | Day 1 | | | |
| -Job Description | SEI Process | Day 1 | | | |
| -Company Profile | SEI Process | Day 1 | | | |
| Mission | SEI Process | Day 1 | | | |
| Goals | SEI Process | Day 1 | | | |
| Values | SEI Process | Day 1 | | | |
| Organizational Chart | SEI Process | Day 1 | | | |
| -Introduction to Staff | SEI Process | Day 1 | | | |
| -Tour of Buildings | SEI Process | Day 1 | | | |
| -Time Sheet | Personal Productivity | Day 1 | | | |
| -Email | Personal Productivity | Day 1 | | | |
| OFFICE EQUIPMENT | Basic Knowledge | Week 1 | | | |
| GOOGLE CALENDAR | Personal Productivity | Week 1 | | | |
| EMPLOYEE MANUAL | SEI Process | Week 1 | | | |
| PAPER TRAIL | SEI Process | Week 1 | | | |

Signee's Printed Name

Signee's Signature

Date of Sign Off



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| Phase II - TRAINING | | | | | |
| DASH | | | | | |
| -Contacts | SEI Process | Month 1-3 | | | |
| -Dates | SEI Process | Month 1-3 | | | |
| -Photos | SEI Process | Month 1-3 | | | |
| -Documents | SEI Process | Month 1-3 | | | |
| -Notes | SEI Process | Month 1-3 | | | |
| -Reports | SEI Process | Month 1-3 | | | |
| -Job Dashboard | SEI Process | Month 1-3 | | | |
| PHONE SYSTEM | SEI Process | Month 1-3 | | | |
| SAGE ACCOUNTING | | | | | |
| -Accounts Receivable | SEI Process | Month 1-3 | | | |
| -Accounts Payable | SEI Process | Month 1-3 | | | |
| -Payroll | SEI Process | Month 1-3 | | | |
| -Year End Processing | SEI Process | Month 3-6 | | | |
| -Close out jobs in SAGE | SEI Process | Month 3-6 | | | |
| LIENS | SEI Process | Month 1-3 | | | |
| DEPOSITS | SEI Process | Month 1-3 | | | |
| DASH SYNC WITH SAGE | SEI Process | Month 1-3 | | | |
| MONTHLY & QTRLY TAXES | SEI Process | Month 1-3 | | | |
| BANK RECONCILEMENTS | SEI Process | Month 1-3 | | | |
| CREDIT CARD RECONCILEMENTS | SEI Process | Month 1-3 | | | |



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| WORKERS' COMP | SEI Process | Month 3-6 | | | |
| BENEFITS | SEI Process | Month 3-6 | | | |
| GARNISHMENTS/CHILD SUPPORT | SEI Process | Month 1-3 | | | |
| PROCESS NEW HIRE PAPERWORK | SEI Process | Month 1-3 | | | |
| EMPLOYEE ATTENDANCE | SEI Process | Month 1-3 | | | |
| SALES REPORTS | SEI Process | Month 1-3 | | | |
| BONUS CALCULATIONS | SEI Process | Month 3-6 | | | |
| BN NUMBERS | SEI Process | Month 3-6 | | | |
| W-2'S/1099'S | SEI Process | Month 3-6 | | | |

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