



# 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			

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Signee's Printed Name

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Signee's Signature

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Date of Sign Off



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## ***ADMINISTRATIVE PERSONNEL - ACCOUNTING/HR***

TRAINING	MODULE	TIME FRAME	DATE OF COMP	INITIALS	COMMENTS
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## ADMINISTRATIVE PERSONNEL - ACCOUNTING/HR

TRAINING	MODULE	TIME FRAME	DATE OF COMP	INITIALS	COMMENTS
<b>Phase II - TRAINING</b>					
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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## ADMINISTRATIVE PERSONNEL - ACCOUNTING/HR

TRAINING	MODULE	TIME FRAME	DATE OF COMP	INITIALS	COMMENTS
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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*Signee's Printed Name*

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*Signee's Signature*

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*Date of Sign Off*