

New Starter Form and Checklist

This form is to be completed by the General Manager or recruiting Line Manager once the candidate has accepted Triaster's offer of employment.

SECTION 1 – Employee Details			
First Name		Surname	
Business Area		Job Title	

SECTION 2 – Starting Date	
Date Offer Accepted	Official Start Date
The 'Official start date' is the date the employee's employment officially starts at Triaster	

SECTION 3 – Annual Leave/Hours	
Annual Leave Entitlement	Contracted Hours

SECTION 4 – Other Instructions (e.g. Booked annual leave, equipment requirements, pension, working location i.e. office/remote)

SECTION 5 – New Starter Checklist			
Pre-employment Paperwork		Responsible	Date Completed
1	Email or telephone call job offer (NB offer withdrawal date)	MD/GM	
2	Create Offer Letter Send Offer Letter, HMRC Checklist and Staff Details and Declaration Form to employee	YHR MD/GM/	
3	Signed offer letter received?	MD/GM	
4	Completed HMRC and Staff Details and Declaration form received?	GM	
5	P45 received?		
6	Send to Finance Manager (completed HRMC checklist, Staff Details and Declaration Form, P45)	MD/GM/BOM	
7	Reference checks	YHR	
8	Right to Work checks	MD/GM	
9	Send Contract to employee and MD for signature	MD/GM	
10	Signed Contract received?	MD/GM	
11	Send Final E-mail with Information Regarding First Day (start time etc)	MD/GM/YHR	
12	Set up folder and save all documents in employee's folder <ul style="list-style-type: none"> • P45 • Staff Details and Declaration • Offer Letter • Contract • Leave requests • Checklist 	GM	

Internal Preparation		Responsible	Date Completed
1	Set Up Telephone Add to Staff Telephone List	BOM	
2	Create Account on LMS for Access to Company Policies & Staff Handbook Invite employee to complete courses	BOM	
3	Inform IT of new starter (change request) <ul style="list-style-type: none"> Email Access privileges to P: Drive Hosted Desktop Password Email distribution lists	GM	
4	Add to MyTime <ul style="list-style-type: none"> Book out 3 days at Christmas Add any pre-booked leave agreed 	BOM/GM	
5	Hardware Arranged for New Employee (if applicable)	GM	
6	IMS Updated (add user if applicable)	BOM	
7	Add new Employee to Password Vault	PO	
8	Support System Updated (add user if applicable)	PO	
9	CRM Updated (add user if applicable)	GM	
10	Invite to Outlook stand-up meetings	GM/PO	
11	Send Welcome card	BOM	
12	Add to Teams	MD/GM	
13	Team Communication meeting or Email Welcoming New Employee	GM	
14	Add Employee to ATC (if applicable)	PO	
15	Add birthday to new general calendar (outlook)	BOM	

Onboarding		Responsible	Date Completed
1	Create Schedule for first week	MD/GM/Line Manager	
2	Introduction to the Team	Line Manager	
3	Introduction to IMS	BOM	
4	Introduction to company Policies on LMS	BOM	
5	Introduction to Systems	Line Manager	

Additional Notes:

Line Manager's Signature	
Line Manager's Name (PRINT)	Date