



New Hire Onboarding Checklist

Welcome to the CeriFi team! We're excited to have you here and can't wait to see all that you'll accomplish in your role. This onboarding checklist is designed to help guide you through your first week at CeriFi. Use it as a roadmap to learn about our tools, processes, and culture.

Systems setup:

- ☐ Login to core systems (email, Slack, Teams)

Complete required onboarding forms, if you have not already done so:

- ☐ Access Paylocity self-service dashboard to review your profile, tax forms, etc.
- ☐ Review benefits options and enroll if applicable/prepare to enroll when applicable

Review the Employee Handbook:

- ☐ Review & familiarize with our [company policies and procedures](#)

Meet with your manager and team:

- ☐ Meet with your manager to:
 - Review role expectations
 - Align on first-week priorities
 - Understand team structure
- ☐ Meet with your team to:
 - Understand team structure and roles
 - Understand how the team collaborates and communicates
 - Understand team expectations

Schedule key stakeholder meetings:

- ☐ Work with your manager to schedule meetings with key stakeholders and business partners

Review team projects and goals:

- ☐ Review & familiarize yourself with current team projects & goals as well as past work of the team

Understand communication norms and expectations:

- ☐ Begin to understand communication norms and expectations of the team and with your manager

Be sure to ask questions and seek clarity; your team is here to support you and your success at CeriFi.



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Tax & Accounting
Fast Forward Academy
Spidell
Checkpoint Learning

Financial Planning
Dalton Education
Money Education

Advanced Designations
Bionic Turtle
Mark Meldrum

Insurance & Securities
Pass Perfect
Solomon
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Financial Crimes
ACFCS