

# FINANCIAL ORIENTATION CHECKLIST

## **New Employees**

1. Give employee Timekeeper user id and temporary pin.
2. Give employee instructions for changing temporary pin.
3. Give employee overview of timekeeper (how to access W2's, pay stubs, leave balances, and tax information).
4. Give employee AESOP user id and pin.
5. Give employee instructions for inputting absence in AESOP. Go over procedures for recording an exception (this may vary by school) but exceptions should be approved before they are entered in AESOP.
6. Has employee completed a direct deposit form?
7. Give employee instructions on how to sign up for Drug Free Workshop.
8. Give employee Care# and ID badge.

## **Returning Employees**

1. Review how to access timekeeper and how to change pin number.
2. Review the information available in timekeeper (how to access W2's, pay stubs, leave balances, and reviewing tax information).
3. Remind employee they have a separate AESOP user id and pin.
4. Review instructions for inputting absence in AESOP. Go over procedures for recording an exception (this may vary by school) but exceptions should be approved before they are entered in AESOP.
5. Are there any changes in employees direct deposit information?

## **All Employees**

1. Give employee copy of appropriate pay schedule (exempt or hourly).
2. Give employee copy of school calendar.
3. Give employee copy of school year fee schedule.
4. Have you received or filled out an installment form?

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5. Give employee copy of receipting procedures.
6. Give employee copy of purchasing procedures.
7. Have employee read and sign Financial Responsibilities Certification.
8. Provide employee with School Leave Request Form and correct way to complete.
9. Provide employee with a building map.
10. Provide employee with copier codes.
11. Provide employee with School Staff Listing.
12. Provide employee School Phone Directory.
13. Provide employee with Worker's Comp Information.
14. Provide employee with details/procedures for flex time.
15. Explain to employee when personal, sick, and annual leave can be taken.
16. Provide employee with a Badge Request Form.
17. Remind employee they need their ID Badge and Care #.
18. Provide employees supplement pay dates, no deduction pay checks, other unusual payroll items (See EOY presentation slide # 6).