

THE ART AGENCY · NEW HIRE

New Hire Onboarding Checklist

Operations Handbook §14 · Complete on Day 1

Employee Name: _____

Start Date: _____

Position: _____

Home State: _____

Pre-Start Verification

☐ Confirm active P&C license in home state — License #: _____

☐ Initiate non-resident license applications for: NH / ME / VT / other: _____

☐ Background check completed

☐ Employment paperwork completed (W-4, I-9, direct deposit)

System Access — Day 1

System	Account Created	Permissions Set	Initials
InsurGrid	☐ Date: _____	☐ Per access matrix	_____
Agency Zoom	☐ Date: _____	☐ Per access matrix	_____
PL Rater	☐ Date: _____	☐ Per access matrix	_____
AMS360	☐ Date: _____	☐ Per access matrix	_____
RingCentral	☐ Date: _____	☐ Per access matrix	_____
Carrier Portals	☐ Date: _____	☐ Per access matrix	_____
SIAA Portal	☐ Date: _____	☐ Per access matrix	_____

Training & Documentation

☐ Operations Handbook issued — signed acknowledgment obtained

☐ System training scheduled (minimum 1 week supervised)

☐ E&O awareness training scheduled (due within 30 days)

Equipment & Materials

☐ Laptop issued — Asset #: _____

☐ Phone/extension assigned — Extension: _____

☐ Agency-branded materials provided

☐ Dealership QR code materials explained

Completed By (Supervisor): _____ **Date All Items Complete:** _____