



The Family Collective

New Hire Orientation Checklist

Revised 2021

Employee Name: _____

Agency: _____ Position Title _____

Hiring Manager/ Agency: _____ Date: _____

This checklist is to ensure that all necessary job functions, role responsibilities and TFC Resources have been given and/or communicated to your new employee.

Week One	Date Completed
1. TFC Orientation <ul style="list-style-type: none"> <input type="checkbox"/> Introduction of UWGN TFC staff <input type="checkbox"/> TFC Overview (PowerPoint) <input type="checkbox"/> Review job description & performance expectations (To be reviewed by Hiring Manager) <input type="checkbox"/> Review TFC Training Program <input type="checkbox"/> Review meeting structure (i.e., All Staff, trainings, etc.) 	
2. Explore TFC's Partner Portal (self-paced): https://www.unitedwaygreaternashville.org/the-family-collective-partner-portal/ Watch how-to's & training videos for: <ul style="list-style-type: none"> <input type="checkbox"/> Arizona Self-Sufficiency Training <input type="checkbox"/> Coaching Training <input type="checkbox"/> Prevention Training <input type="checkbox"/> Coordinated Entry Training (For Davidson County Partners) <input type="checkbox"/> Safe Haven Rapid Re-housing 	
3. TFC SWAG Choose available SWAG items (t-shirt, sweatshirt, hat, etc. depending on availability/stock) <ul style="list-style-type: none"> <input type="checkbox"/> Inform UWGN staff what size t-shirt you need 	
Week Two	Date Completed
4. Meet and greet with Manager of Client Care Review intake paperwork and resources <ul style="list-style-type: none"> <input type="checkbox"/> General Intake Form <input type="checkbox"/> Salesforce Release of Information <input type="checkbox"/> MNPS Release of Information <input type="checkbox"/> TFC DHS Eligibility Form <input type="checkbox"/> TFC Zero Income Form <input type="checkbox"/> ASSM & Questions <input type="checkbox"/> ACES Questions 	
5. Salesforce Overview (self-paced) Watch training videos for: <ul style="list-style-type: none"> <input type="checkbox"/> Salesforce (12/3/20) <input type="checkbox"/> Creating a Household in Salesforce 	

<input type="checkbox"/> Goals in Salesforce <input type="checkbox"/> Review Salesforce Workflow <input type="checkbox"/> Schedule 1:1 with Senior Manager of Data and Evaluation after your 1 st enrollment (Can be later than Week Two; Schedule through Partner Portal Calendly)	
Week Three	Date Completed
6. Referral process for wraparound services (self-paced) Watch training videos & look at how-to's for: <input type="checkbox"/> Financial Counseling <input type="checkbox"/> Employment Navigation <input type="checkbox"/> Mental Health Counseling	
7. Meet and greet with Manager of 2-Gen and wraparound service providers as needed for your position. <input type="checkbox"/> Financial Counselor <input type="checkbox"/> Employment Navigator <input type="checkbox"/> Mental Health Counselor	
Week Four	Date Completed
8. Meet with at least one TFC partner that shares your role (contact list in partner portal)	

