



## NEW EMPLOYEE CHECKLIST

Employee name: \_\_\_\_\_ Hire date: \_\_\_\_\_

Department/Location: \_\_\_\_\_ Supervisor/Manager: \_\_\_\_\_

- \_\_\_\_\_ Fill-Out JTM™ Employment Application And Applicable Employment Agreements
- \_\_\_\_\_ Fill-Out Federal Income Tax Withholding Documentation
- \_\_\_\_\_ Fill Out State Income Tax Withholding Documentation
- \_\_\_\_\_ Fill-Out Federal Employment Eligibility Verification Form
- \_\_\_\_\_ Fill-Out Payroll Forms, Including Direct Deposit, Health Insurance And Retirement Savings Plans (If Applicable)
- \_\_\_\_\_ Receive And Sign Acknowledgement Of JTM™ Realty Masters Employee Handbook
- \_\_\_\_\_ Sign Conflict Of Interest Letter
- \_\_\_\_\_ Review And Sign Employ At Will Disclosure
- \_\_\_\_\_ Sign Personnel Record Release Authorization
- \_\_\_\_\_ Assign And Train Voicemail And Email Accounts And Systems
- \_\_\_\_\_ Review Office Equipment Usage
- \_\_\_\_\_ Review Office Specific Information – I.E. Location Of Forms, Copier, Mailboxes, Etc.
- \_\_\_\_\_ Receive Temporary Business Cards And Order Permanent Business Cards (If Applicable)
- \_\_\_\_\_ Receive And Review Contact List
- \_\_\_\_\_ Receive And Acknowledge Office Key
- \_\_\_\_\_ Review Company Calendar For Next 30-Days
- \_\_\_\_\_ Learn To Fill-Out Weekly Schedule Form
- \_\_\_\_\_ Schedule S.E.L.L. Training
- \_\_\_\_\_ Review And Assign “I know how to...” Checklist

### **(Only Commissioned Sales Associates Continue)**

- \_\_\_\_\_ Schedule Quantum Home Tour™ Training
- \_\_\_\_\_ Schedule Probing Training™
- \_\_\_\_\_ Fill-Out 45-Day Permit Sponsorship (If Not Previously Completed)
- \_\_\_\_\_ Fill-Out Local Realtor® Board Forms
- \_\_\_\_\_ Review Commissioned Sales Associate Employment Agreement
- \_\_\_\_\_ Review Quantum Home Tour™ And Company Advertising Policies & Procedures
- \_\_\_\_\_ Review Transaction Forms
- \_\_\_\_\_ Provide Announcements (200 Cards)

### **(Only Sales Associates Entering The Journey To Mastery™ Program Continue)**

- \_\_\_\_\_ Review And Re-Commit To The Journey To Master™ Manual And Foundation
- \_\_\_\_\_ Review And Learn To Use Action Monday Forms
- \_\_\_\_\_ Assign Journey to Mastery™ Scripts - Memorization Deadline Next Monday To Move To Group 1
- \_\_\_\_\_ Assign To Mentoring Cluster



**"I know how to...."  
CHECKLIST**

Employee Name: \_\_\_\_\_ Date: \_\_\_\_\_

Department/Location: \_\_\_\_\_

Supervisor/Manager: \_\_\_\_\_

By checking and signing you acknowledge you have been instructed in and accept responsibility in the following and are eligible to graduate from the orientation group.

- \_\_\_\_\_ Copy Machine Usage - please bring example
- \_\_\_\_\_ Voicemail Usage - please reply to the voicemail Human Resources sent you
- \_\_\_\_\_ Email Usage - please reply to the email Human Resources sent you
- \_\_\_\_\_ Web Usage - please bring an example of the JTM™ website printed out
- \_\_\_\_\_ Fax Machine Usage - please reply to the fax Human Resources sent you
- \_\_\_\_\_ Weekly Schedule Form - please bring your schedule from last week

For Sales Associates Only:

- \_\_\_\_\_ Transaction forms - please bring a completed sale processing form
- \_\_\_\_\_ How to request a Quantum Home Tour™ and Company Advertising Policies

For Journey to Mastery™ Sales Associates Only:

- \_\_\_\_\_ MLS usage - please bring an MLS print-out
- \_\_\_\_\_ Please review your scripts with the Human Resources Representative

I certify all the above are complete and I have officially graduated the Orientation Group.

\_\_\_\_\_  
Employee

\_\_\_\_\_  
Date



## EMPLOYEE EXIT CHECKLIST

### EMPLOYEE EXIT CHECKLIST

(To be completed by hiring manager/office)

Employee Name: \_\_\_\_\_ Exit Date: \_\_\_\_\_

Department/Location: \_\_\_\_\_

Supervisor/Manager: \_\_\_\_\_

The following must be completed before the employee's Exit Date:

- \_\_\_\_\_ Collect keys
- \_\_\_\_\_ Disconnect Voicemail
- \_\_\_\_\_ Disconnect Email
- \_\_\_\_\_ Disconnect Web
- \_\_\_\_\_ Do Status Change Form for Health Insurance
- \_\_\_\_\_ Cobra Letter
- \_\_\_\_\_ Email Accounting with Exit Date
- \_\_\_\_\_ Sign off Real Estate License if applicable
- \_\_\_\_\_ Complete Personnel Worksheet
- \_\_\_\_\_ Contact the following Departments

- ☐ Accounting
- ☐ Human Resources
- ☐ IT Department
- ☐ Management Team