

New Hire Training & Onboarding Pipeline

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***Please note, this pipeline is for the training & onboarding of new team members.**

Before you get started:

1. Read through our Wiki "How to use this pipeline" [Linked here](#)
2. Create the New Employee Onboarding Wiki page inside TaxDome. Find the training & language for the Wiki linked [here](#).

Create Job Templates

Template Name: New Employee Onboarding

- **Job Name:** New Employee Onboarding - [ACCOUNT_NAME]
- **Due Date:** Set the timing for 2 weeks to allow for adequate training

Pipeline Settings

Pipeline Name: Employee Training & Onboarding Pipeline

Sort jobs by: Time in stage, oldest first

Job card fields: Name, Description, Due Date, Assignees

STAGE 1: Admin/System Onboarding

1.Create Task: OB- Confirm Access

Description: Test & confirm access to the systems listed under subtasks

Sub-tasks:

- Firm email
- TaxDome
- [Insert addtl systems where access is needed here]

2.Create Task: OB- Track Your Time

Description: [Does your firm use time tracking? Use this task to tell the employee how they can track their time. Include link to a loom video if they need a visual training of how to do this]

3.Send email: OB- Let's Get You Onboarded!

Email Template Name: OB- Let's Get You Onboarded!

Subject: Let's get you onboarded!

Hi [FIRST_NAME]!

Now that you should have all the access you will need to do your job here, we want to make sure you know what to do and how to do it!

To get started on your onboarding & training, please [watch this video](#) that will walk you through your TaxDome Quickstart Guide.

This will show you how to access your training & onboarding materials inside TaxDome. Please take some time to dive into these trainings, review and complete your tasks, and don't hesitate to let us know if you have any questions or if any issues pop up!

Automove: On

STAGE 2: Independent Training

1.Add Wiki Page: New Employee or Contractor Onboarding in TaxDome

[See link shared above for details on adding this Wiki including the training links]

2.Create Task: OB- Complete training videos

Description: Utilize the Wiki Page: "New Employee Onboarding" to access your training videos.

Watch each of these videos, and then mark them off. Once you've reviewed all these trainings, mark this task as complete.

Sub-tasks to add:

- TaxDome: Quickstart Guide
- TaxDome:Navigating TaxDome + Terminology
- TaxDome: Learning the Core Features & Tools in TaxDome
- TaxDome:Pipelines, Stages, Jobs, Automations, Templates
- TaxDome:Setting up your preferences
- TaxDome:Using TaxDome's Calendar & Workflow
- TaxDome:Using Inbox+
- TaxDome: How Pipelines Work in TaxDome
- TaxDome: Adding Jobs & Recurrences to Pipelines
- TaxDome: Inviting Clients to Your Portal, Resetting Passwords & Managing Client Portals
- {Insert addt'l training videos here}

Automove: On

STAGE 3: Workload Ready

1.Create Task: OB- Set up your TaxDome

Description: Using the tools and trainings you have now received, go ahead and set up your TaxDome preferences & notifications. Take some time to get familiar inside TaxDome with the navigation you've learned.

2.CREATE TASK: OB- Review Assigned Workload & Get Organized in TaxDome

Description: Review assigned workload inside the Workflow, Calendar & Inbox+ tab. Get organized inside your systems, bookmark tabs, save favorites, etc. Reach out with any questions on assigned work.

3.Create Task: OB – Confirm with supervisor, ready to go

Description: Work with your direct supervisor to advise them that you are ready to go and onboarding is now complete.

Automove: On

STAGE 4: Onboarding Complete

1.Send Email: OB- Employee Onboarding Complete

Email Template Name: OB- Employee Onboarding Complete

Subject: Your Onboarding is Complete!

Hi [FIRST_NAME]!

Congratulations! Your Onboarding is complete, and you're now ready to dive on in.

You should have reviewed your workload assigned to you inside TaxDome, so please ensure you reach out ASAP with any questions.

We look forward to working together!

[Your Name]

2.CREATE TASK: OB- Archive job

Description: Once onboarding is complete, archive this job..

Automove: Off