Onboarding Process - Mentors

CONTENTS:

1. Create Zoho Account
2. Send out Contract & Next Steps
3. Create Opus Account
4. Create Slack Account and Channels
5. Send Employee Agreement
6. Send Employee Information Form
7. Send Welcome Email to Personal Email
8. Initiate Onboarding Course through High Level
9. Create Xero Account
10. Legal Requirements
11. Organise Onboarding Meeting with Marie
12. Organise Name Tag & Door Sign

Create Zoho Account

Log onto your **zoho mail** account here: mail.zoho.com

1. Click the **control panel** tab, and then **mail & docs**

2. On the left hand menu bar, select **user details**

3. Click **add user**

4. Input the new employee's **personal details** as required

WEST COAST
MUSIC SCHOOL

5. Use their **first name** for their email ID (ie

   kathryn@westcoastmusic.com.au)

6. Create a default password of **WCMSperth25!**

7. Click **Ok**

Create Opus Account

1. Login to Opus: www.opus1.io

2. Click Add Staff (from the left hand menu)

3. Input all personal details

4. User Type: Staff

5. Input availability

6. Input wages

7. Secondary Attribute: [instrument] mentor

8. Bio: Input Bio

9. TAGS:

   a. Instruments: Input Instruments

   b. Expert Areas: Input expert areas

10. Email notifications: All should be GREEn except subscription updates.

11. Opt out of Manager/Owner Emails: ON

12. Can Visitors see this Staff: ON

13. Can Clients see this staff: ON

14. Deactivate Staff: OFF

15. Click update staff

Create Slack Account & Channels

1. Open Slack: wcmsptyltd.com
2. Click on West Coast Music School > Invite people to West Coast Music School
3. Input employee's **work** email address & click send
4. Under Channels, create the employees private space:
   a. Click the arrow next to channel
   b. Click Create
   c. Click Create Channel
   d. Name: [name's]-space
   e. Click Next
   f. Ensure channel is set to PRIVATE
5. Add employee to relevant channels:
   a. Their space
   b. Event-Management
   c. Their instruments
   d. Leave-requests
   e. resource-orders
   f. good-vibes

6. Finally, finish up by posting the following in the employees space:

@[user] hello my friend and welcome to Slack! This is your private channel with just you, Me, Kiara and Marie. No one else can see what is happening in the chat except for us 4. I want to give you a quick orientation:
1. **Channels** - you should be able to see you have access to a few different channels. To understand them, make sure you complete your onboarding course.
2. **Threads** - Utilising the 'threads' function in slack will be vital to us not losing information in these channels. So if you are ever responding directly to a topic or conversation, do so in a 'thread' and not as a general comment in the channel. To do this, hover over the original comment in the channel and click on the speech bubble. This will allow you to start a chat within a chat.
3. **Try and respond to this comment from me in a thread** :slightly_smiling_face:

Send out WELCOME TO WCMS Email

1. This email should be sent to their work email

Subject: Welcome to WCMS - START HERE

Importance: Mark very important

Body:

Hi [NAME],

There will be quite a few emails sitting in your inbox already - but this is the best place to start!

You will get an email from me everyday over the next couple of weeks to help you get settled into your new role.

For now, the priority is to get you all set up and ready to teach:

1. **Contract** needs to be signed and sent back ASAP
2. **Employee information** form needs to be completed within 28 days >> https://forms.gle/oKi6mcLQZ28oWJat8
3. **Jump on Slack**. There is an email in your inbox inviting you to join our Slack Team. You can learn more about Slack here
4. **Jump onto Opus** (our studio management software). There is an email in your inbox inviting you to log into your account and set up a new password. You can learn more about Opus here
5. Keep an eye out for your **onboarding course access**. It's essential that you work through the modules to give yourself the best chance of success in your new role.
6. Send your **headshot and bio** to Kathryn ASAP. You can get inspo at www.westcoastmusic.com.au/your-teachers

We will take our time with the rest :)

Keep an eye on your inbox each day to learn something new with the goal of getting settled in.

I'll see you on Slack very soon - once you are on there, send a quick message saying hi to the team in the studio-wide-chats channel.

All my best

[your details]

Send out Contract & Next Steps

1. Create a new employee contract using the appropriate contract template: 📄 Casual Employment Contract TEMPLATE
2. Send the following email to the new employee (with contract attached) to their PERSONAL email.

SUBJECT: Contract & Next Steps

BODY:

Hi [NAME],

So excited to welcome you into the WCMS team! Here is a quick list of next steps:

1. **CONTRACT:** Review & Sign Employment Contract ASAP (including witness signature) - contract is attached to this email. Please return via email to kathryn@westcoastmusic.com.au
2. **EMPLOYEE INFO FORM**: Please complete this employee information form: https://forms.gle/R5RnFfqKP9X2AT9y5

3. **WORKING WITH CHILDREN CHECK:** Please send a copy of your WWCC ASAP. If you do not have one, please let me know

4. **ONBOARDING MEETING**: Please advise us if you are available for a 60 min onboarding within the next two weeks - let us know your availability for this.

ACCESSING YOUR WORK EMAIL

From this point onwards, we will be doing all of your onboarding, communication and orienting via your work email.

To access this account, go to mail.zoho.com and log in using the following details:

Email: [employee email]

Password: WCMSperth25!

You will be prompted to change your password after you have logged in.

You will find quite a number of emails waiting for you in your inbox. Start with the email ' START HERE: WELCOME TO WCMS''. This will guide you through how to approach all the other emails.

If you have any questions, please don't hesitate to contact me.

All my best,

[Your details]

Initiate Onboarding Course in Go High Level

1. Go to app.gohiglevel.com and login
2. Go to WCMS subprofile
3. Click Contacts
4. Add Contacts
5. Add Employee Name and work email
6. Scroll down to courses (left hand menu)
7. Click "onboarding"
8. The course access will automatically be emailed to them

Onboarding Meeting with Marie Lee

1. Marie to organise a 60 minute session with the new employee to run through in-studio need-to-knows.
2. Marie to run through the onboarding checklist with the new team member: 📄 Employee Onboarding Meeting Checklist.pdf

Create Xero Account

Once an employee has sent back their signed employment agreement and employee information form, you will be required to input the details into **xero** to update your School's Payroll.

This needs to be done as soon as the relevant documentation (employee information form) is returned to WCMS.

1. Log onto your **xero** account here: xero.com/au
2. Click on the **payroll** tab, then **employees**
3. Click **Add Employee**
4. Input the employee's **personal information** (all fields)
5. NB: Use the employee's **work email** address in the email field.
6. Click **save**

WEST COAST
MUSIC SCHOOL

7. Edit Employment:
    1. Input the employee's start date
    2. Select **fortnightly** pay calendar
    3. Under **earnings rate**, select **ordinary hours**.
    4. Under **superannuation Membership**, input the employee's supplied details. If the employee has requested the employer's super fund, please contact HQ to organise.
    5. **Click Save**

8. Edit Tax
    1. Input the employee's Tax File Number (TFN) or TFN Exemption number
    2. Under **Employment Basis**, select the appropriate employment basis (eg. **casual**, part time, full time)
    3. Select the appropriate tax factors (eg Tax free threshold, HECS debt) based on the information on the employee information form.
    4. Click **FILE NO.**
    5. NB: THIS MUST BE DONE WITHIN 28 DAYS FROM THE START DATE TO AVOID FINES FROM THE ATO

9. Edit Bank Accounts

    1. Under Statement text, input **WCMS Pay Cheque**
    2. Input the employee's Banking details as included on their employee information form
    3. **Click Save**

10. Edit Pay Template

    1. Click Add Earnings Line, select **Ordinary Hours,** select **Enter Rate,** click **ok**.
    2. Under Rate, input the employees hourly wage as stated on the employee agreement schedule
    3. Click **Add Superannuation Line** and input the employee's details as stated on their employee information form
    4. **Click save**

11. Edit Notes

1. Under notes, please create a note with the employees personal email address and save.

Legal Requirements

To work with the WCMS team, there are a number of legal requirements every employee needs to meet. These are mainly focused around the fact that we are working with children.

The legal checks that the employee will need to ascertain are as follows:

1. Current Working with Children Check (WWCC)
2. National Police Clearance (ideal, not essential)
3. Tax File Number

Copies of the WWCC & Police Clearance need to be stored in the Employee's MMS file

Organise their Name Tag

Once the team member has passed their probation period they will need a custom name tag for them.

☐ Create the name tag document in canva:
https://www.canva.com/design/DAGcth5fpCM/51vmwdP-cdHDKFvrWIrS9A/edit?utm_content=DAGcth5fpCM&utm_campaign=designshare&utm_medium=link2&utm_source=sharebutton

☐ Order ID card through:
https://www.etsy.com/au/listing/1531069986/custom-id-card-printing-custom-badge?ref=shop_home_feat_1&pro=1&sts=1&logging_key=e6c7910531579bf385961b91e8bf9d482d585d28%3A1531069986