

HR ONBOARDING INFO:

Potential hire demographic details needed:

Full name _____

Contact information _____

Phone number _____

Email address – personal _____

Potential job title _____

Full list of current job duties _____

please use additional pages as needed _____

Estimated start date _____

NMLS ID#, if licensed _____

If licensed, in what states? _____

Which will be transferred? _____

Originating in own name, or supporting another LO? _____

Branch or team details:

Branch name _____

Branch code _____

Physical work location _____

Joining Existing P &L? – Yes or No _____

If No – New Branch Name (please reach out to Kristi Busch for next branch #) _____

If Yes – Joining which Br # _____

Hiring Manager _____

Will this person be the point of contact for pending items? _____

Timecard supervisor and/or manager they will report to on daily basis _____

Other:

Best contact method – email or phone call? _____

External point of contact, if necessary _____

HR ONBOARDING INFO:

Production/Team information:

Units funded annually/monthly

Type of loans

purchase vs. refi %

Conv., FHA, VA, USDA, DPA, MH, etc... how many each month

Normal application style, phone/in person vs. online application

Team members joining VIP

Detailed list of current duties & experience for each member

(Please use additional pages as needed)

MARKETING

Database (We would preferably love to have the database before the person starts)	_____
Headshot (We would preferably love to have the headshot before the person starts)	_____
Social media URLs	_____
Address	_____
Is the branch address they are coming onboard with going to be their permanent address	_____
If temporary, what will their permanent address be	_____
Do they have their own website	_____
If yes, are they going to be keeping it	_____
If yes, what is the login information to the site so we can update it for them	_____
1. Point of contact for the transition – internal	_____
a. Do we call them the mentor for ops?	_____
b. The onboarding coordinator?	_____
c. Depending on the size of the team/breadth of the transition, do we have two mentors?	_____
d. Very important that new hires know who to go to for what	_____
2. Most concerned about sense of urgency	_____
3. If they are managing a P&L, have they managed a P&L before?	_____
If they haven't, they need to have mandatory training from Kirk about how it works, compensation, etc.	_____
What Floify access is needed?	_____
Remote employee? If yes, how often remote?	_____
Encompass Persona	_____
Encompass experience? New, medium, seasoned	_____
Mentor	_____
Notes for training	_____
Special training needs	_____