Tuesday, September 8: The Executive Assistant's First Day

Who does what today. One owner per item. Nothing else is expected today.

Today at a glance

Time	Owner	What
8:30	BDA	The EA's desk, laptop, phone on Wi-Fi, first logins.
9:30	BDA	Systems set-up and orientation with the EA, until 11:00.
9:30	Shea	CSS Sync (Teams). Shea is available for the authenticator step from 10:00.
11:00	Shea	With the EA in Shea's office, until noon. Her systems, a normal day, this week.
12:00	EA	Lunch.
12:30	OM	Payroll and paperwork with the EA, 30 minutes.
1:00	Shea	Advisory.
1:00	EA	Anything the BDA has left to finish, then reading.
2:30	EA	Enter the two-week plan in her calendar.
4:15	EA	First entries in the Open Items register. Day ends 4:30.

The EA

Your job today is to get every system working and to know what a normal day looks like. Nothing is due today.

- The BDA runs the morning. Open every login yourself before he moves on; do not let him do it for you.
- At 11:00 Shea walks through your systems in the order you will use them, then the week. Bring any question from the morning.
- After lunch: The OM for payroll, then finish anything the BDA has left, then read 1.1, 1.4, 1.5, 1.6, 1.7, 3.1 and 3.2.5.
- Done today: every login works, the two-week plan is in your calendar, and the Open Items register has its first entries.

The BDA

You own the EA's set-up from 8:30 to 11:00. Shea's first time with her is 11:00. The standard is that the EA opens each system herself and it works. Post each item in #ea-onboarding as it closes, one post per item.

Item	Done looks like
Laptop and phone	Signed in, on Wi-Fi, third monitor connected.
1Password	Her seat on laptop and phone.
Microsoft 365	Outlook and Teams open. Shea's email added to her Outlook. Shea is needed for the authenticator; get him after 10:00.

Item	Done looks like
Slack	She is in #ea-onboarding and all four sync channels (Shea adds her to the three she is missing). Canvas tabs opened once.
Notion	Playbook opens. She has edit access on the Open Items database in 9.15 and nothing else. Test it by having her add and delete a row.
Microsoft To-Do	Installed and signed in. Empty is fine.
Wealthbox and Box	Open once so she has seen them. No walkthrough today.
Left over	Anything not finished by 11:00 is picked up at 1:00.

The OM

You own payroll and paperwork, 12:30 to 1:00. Everything below is already in the Slice 2 plan; this is the same list, in order, so nothing is missed. Take the time you need.

- Collect anything still outstanding: SIN, void cheque, TD1 federal, TD1 BC.
- Confirm the signed employment agreement is in Box.
- Confirm her hours with her: 8:30 to 4:30, 30-minute unpaid lunch, Monday to Thursday. This week only, Tuesday to Friday.
- Add her to Wagepoint. The first run is this week; Shea sits with you for it.
- Done looks like: Wagepoint confirmation posted in #ea-onboarding after the run, by Thursday.