



# Implementation Guide

We are excited to welcome you to TriNet. Incredible Starts Here. We are pleased to kick off this relationship and begin the implementation process! Read on for details about how we'll connect your company and worksite employees to our world-class technology and excellent human resources services.

## Implementation starts with:

- An official "Welcome" email from Burton Goldfield, President and CEO of TriNet.
- A "Welcome to TriNet" email sent to the person you designated in your TriNet Services Requisition (TSR), with instructions for accessing our secure platform ([login.trinet.com](http://login.trinet.com)).
- A short conference call where your TriNet Sales Consultant will introduce you to your TriNet implementation team.

## Implementation is complete when:

- A successful first payroll is processed.
- Your Implementation Consultant confirms that all the actions in your Implementation Timeline have been completed.
- Your Implementation Consultant transitions you to your TriNet Customer Experience team.

## What you can expect during implementation

We will create a customized Implementation Timeline for you—this is your Implementation roadmap, which will highlight the actions we'll take together to reach key milestones, along with deadlines for each action. Some of the activities you'll see in this Timeline are shown on the following page.



**1** **WELCOME CALL**

Your Sales Consultant will introduce you to your TriNet implementation team. Your Implementation Consultant will provide you with your customized Implementation Timeline and service team contacts.

Be prepared to check your calendar during this call to schedule future Implementation meetings.

**2** **COMPANY SETUP**

Your Implementation Consultant will guide you through entering your company's information directly on the Customer Setup Site (CSS).

You should plan for about 90 minutes to complete this action. You can review your entries prior to finalizing your decisions.

*To prepare, review: CSS Checklist*

**3** **WORKSITE EMPLOYEE SETUP**

Within 24 hours after submitting your CSS, your CSS Authorizer will receive an email notification indicating that worksite employee data can be loaded into the system.

Your Implementation Consultant will schedule a 30-minute meeting to assist you (or your designated CSS Authorizer) in completing this activity.

*To prepare, review: Employee Setup Checklist*

**4** **PLATFORM TRAINING**

Your Implementation Consultant will guide you through the TriNet platform to help you navigate efficiently and get the most out of the features available to you.

For your worksite employees, the New Hire Orientation is easily accessible on [login.trinet.com](http://login.trinet.com) and can be viewed at any time as needed.

**5** **RUN FIRST PAYROLL**

Your Implementation Consultant will assist you with the remaining time-sensitive actions required to deliver your first TriNet payroll and successfully complete your Implementation.

*To prepare, review: Payroll Process Guide*

**6** **TRANSITION**

Your Implementation Consultant will review the Implementation Timeline for completion and when ready, transition you to your ongoing TriNet service team.

## Introducing your TriNet team





**Implementation Consultant:** Dedicated project manager who will guide you from the very start of your Implementation through the successful reporting, funding and completion of your first TriNet payroll.

**Customer Experience team:** For ongoing service, you will be assigned a dedicated contact who will respond to all of your needs and coordinate your relationship with TriNet. Your designated contact is supported by a team of HR experts that specialize in areas like benefits, payroll, HR compliance, employee relations, and risk management.

**TriNet Solution Center:** Your worksite employees will be introduced to the Solution Center, the first line of employee support for navigating the TriNet platform, payroll and benefits (including health benefits, flexible spending accounts, retirement and more). The Solution Center is available via phone, chat and email.

### Implementation Survey – Your Voice Matters!

We are constantly striving to improve our delivery of services to our clients and we would greatly value your candid feedback on your Implementation experience. A member of TriNet’s Client Success team will contact you after your Implementation with a short survey.

Thank you for choosing TriNet! Incredible starts here.

#### Disclaimer

Copyright © 2018 TriNet. All rights reserved. All trademarks, trade names, service marks and logos referenced herein belong to their respective companies. All rights and obligations between the parties are solely those set forth in a TriNet Services Requisition executed by an authorized officer of TriNet. TriNet does not sell legal advice, tax advice, or insurance, and nothing herein is an offer of sale of insurance to you. You agree and acknowledge that you have all necessary and proper right, license, and authority to transmit or share with us the information specified above and any other information you may share.