**3501FR.56 Onboarding - A New Employee Checklist**

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| **ROLE** | **STEPS TO BE TAKEN *PRIOR TO* EMPLOYEE’S FIRST DAY** |
| **Manager**  **OR**  **Designated Personnel**  **within**  **Department** | Note the new employee’s NetID and pin from the automatic email sent by Staffing & Career Development  Call to officially welcome the new hire to Yale:   * confirm acceptance * confirm employee start date, time and meeting location on first day * provide your contact information in case the employee has questions before start date * provide employee with their NetID and pin, and direct them to Workday via [*It’s Your Yale*](http://your.yale.edu/) to complete inbox tasks (I-9, benefits, etc.) – [WD Onboarding Guide](http://workday.training.yale.edu/training-materials/onboarding-new-employees)   For assistance, please contact Employee Services at [employee.services@yale.edu](mailto:employee.services@yale.edu) or 203-432-5552 |
| **Department HR Specialist**  **OR**  **Designated Personnel**  **within**  **Department** | Notify Department DSP or ITS Help Desk of new employee’s start date, NetID and computer needs (laptop vs desktop) as soon as possible; order computer(s) peripherals, if necessary, after consulting with DSP *(purchase through* [*SciQuest*](https://solutions.sciquest.com/apps/Router/Home?tmstmp=1469896682105)*):*   * Laptop/Dock/misc. * Desktop   Schedule meeting with DSP *(if applicable)* on employee’s first day to set up computer/printer  *A temporary password must be created to setup the computer prior to the employee’s first day; the employee will still be able to log in to their computer with their NetID password on their first day*  To request access for the following systems (*if applicable*), please submit an [Oracle START request](http://its.yale.edu/start-system-technology-access-request-tool) *(Note: Your Operations Manager is the approver)*   * *Oracle* * *Expense Management System (EMS)* * *SciQuest* * Desk phone *(Under “ADD” Telephone services in START; use dept PTAEO)* * Mobile phone, if applicable *(Under “ADD” Telephone services in START; use dept PTAEO)*   Contact the ITS Helpdesk at 203.432.9000 or [helpdesk@yale.edu](mailto:helpdesk@yale.edu) for access\* to the following systems:  *\*Review the former incumbent’s access to determine what access, if any, to request for the new employee*   * FileNet * Reporting:   + BUG/DataWarehouse/Brio   + Effort Reporting * Shared Drives   *(****Please note:*** *It can take up to a week to obtain access to some of these systems so please submit your requests as soon as you know the new employee’s start date)*  Access to the following systems is granted as outlined below:   * Workday *(access granted after hire is processed and the new staff member’s NetID is generated)*   + ***Please note:*** [Workday Roles form](http://policy.yale.edu/forms?keys=workday&field_business_area_taxonomy_tid=All&field_home_page_taxonomy_tid=All) must be submitted if specific role assignments are required. Instructions can be found at [WD Role Request Form Instructions](http://your.yale.edu/sites/default/files/role_based_and_user_based_role_request_form_instructions_0.pdf). Submit the completed form to [employee.services@yale.edu](mailto:employee.services@yale.edu). * STARS *(granted automatically upon start date)* * Kronos *(granted automatically one day after start date)*   + Send request to change timecard approver to [employee.services@yale.edu](mailto:employee.services@yale.edu) (*if applicable*)   For temps/casuals, complete the [Casual/ Temporary ID Request Form](http://idcenter.yale.edu/sites/default/files/files/CASUAL%20ID%20Form%20-%20New%202014.pdf)  Miscellaneous access requests and additional tasks:   * Purchasing Card *(submit* [Purchasing Card Request Form](http://policy.yale.edu/forms?keys=&field_business_area_taxonomy_tid=All&field_home_page_taxonomy_tid=20&=GO)*)* * Meeting/ Conference room booking access * Other applicable systems (i.e. YBT, [DARCY](http://darcyinfo.yale.edu/sites/default/files/files/Additional%20Resources/FAQs.pdf), Salesforce, [IRES](http://its.yale.edu/forms-policies/forms/ires-user-access-request), etc.) * SharePoint *(including department specific sites, if applicable)* * Prepare work space: clean, order supplies – paper, pens, keys, business cards (*if applicable*) * Send an email to the department/building announcing the new employee * Update any departmental directories not automatically updated by Workday |
| **ROLE** | **STEPS TO BE TAKEN *ON* EMPLOYEE’S FIRST DAY** |
| **Manager**  **OR**  **Designated Personnel**  **within**  **Department** | Review Key Policies (focusing on your specific department)   * 90-day probationary period (*if applicable*) * Confidentiality * Dress code * E-mail and Internet use * Emergency procedures * Time tracking and time off: Holidays, PTO, Sick leave, reporting absence, overtime (*if applicable*) * Injury prevention * Lateness policy * Performance reviews * Approving direct reports’ time tracking *(if applicable*)   Place a reminder on your calendar to meet with the new employee upon completion of their first 30 days to:   * Review observations, issues and priorities * Continue to clarify roles, responsibilities and expectations, as needed * Ensure any mandatory training has been completed * Answer questions and concerns about time tracking |
| **Department**  **HR Specialist**  **OR**  **Designated Personnel**  **within**  **Department** | Direct new employee to Workday via [*It’s Your Yale*](http://your.yale.edu/) (if they haven’t already done so) to complete I-9 ***on start date****,* benefits, tax forms, and other onboarding tasks that appear in the Workday inbox  Ensure DSP is scheduled to setup the following:   * Map to printer * Map to Shared Drive * Offsite network access and instructions on remote access from home (laptop & pc) * Outlook (Email, Calendar); provide overview of calendar sharing   Have new employee obtain ID from ID Center and, once obtained, request appropriate building access by emailing Access Control at [432.open@yale.edu](mailto:432.open@yale.edu) (Central Campus) or [785.open@yale.edu](mailto:785.open@yale.edu) (Medical School Campus)  Review General information   * Set up parking * Review [*It’s Your Yale*](http://your.yale.edu/)   + Workday   + My Time |