**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 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 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.
* 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 (*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
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| **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
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| **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 (Central Campus) or 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
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