# Onboarding a New Employee Checklist

**Revised 6/29/2022**

<table>
<thead>
<tr>
<th>Role</th>
<th>Steps to be Taken <em>Prior to</em> Employee’s First Day</th>
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| **Manager**  
- OR -  
Designated Personnel within Department | ☐ Note the new employee’s NetID and pin from the automatic email sent by Client Accounts.  
☐ 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 the start date; and  
  - provide employee with their NetID and pin, and direct them to Workday via [It’s Your Yale](https://www.yale.edu/workday) to complete inbox tasks (I-9, benefits, etc.) - [WD Onboarding Guide](https://www.yale.edu/workday)  
☐ 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 accessed through Workday)*:  
  ■ 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.*  
☐ Request access for the following systems *(if applicable)*:  
  ■ Desk phone  
  ■ Mobile phone  
☐ 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  
  ■ 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: If specific role assignments are required, role requests can be submitted within Workday using the instructions outlined in the Managing Roles in Workday training guide.*  
  ■ 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](https://www.yale.edu/workday).  
☐ Miscellaneous access requests and additional tasks:  
  ■ Purchasing Card *(submit Purchasing Card Request Form)*  
  ■ Meeting / conference room booking access  
  ■ Other applicable systems *(e.g., YBT, Hopper, Salesforce, IRES, Voyager)*  
  ■ 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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| Manager - OR - Designated Personnel within Department | ☐ Review key policies (focusing on your specific department)  
☐ 90-day probationary period *(if applicable)*  
☐ Confidentiality  
☐ Dress code  
☐ Email 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  
☐ For all managers who will be responsible for hiring and managing other Yale employees:  
☐ Ensure they are enrolled in the next available session of Managing at Yale Essentials. For more information, visit the TMS website.  
☐ Ensure they are enrolled in the next Great Manager program following completion of the Managing at Yale Essentials course. For more information, visit the TMS website. |
| Department HR Specialist - OR - Designated Personnel within Department | ☐ Direct new employee to Workday via *It’s Your Yale* *(if they haven’t already done so)* to complete I-9, benefits, tax forms, and other onboarding tasks that appear in the Workday inbox  
☐ Ensure that new employee completes their I-9 in Workday *on their 1st day*  
☐ Follow up with new employee to ensure that they’ve visited an I-9 center *no later than three business days from their start date*  
☐ 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 an ID card from the 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*  
  • Workday  
  • My Time  
☐ Provide notice of employee rights under the Connecticut Family and Medical Leave Act and the Connecticut Paid Family Medical Leave Act: CT Annual Notice. |