## Onboarding a New Employee Checklist

**Revised 1/25/2024**

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<tr>
<th>Role</th>
<th>Steps to be Taken Prior to Employee’s First Day</th>
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| **Manager**<br>- OR -<br>Designated Personnel within Department | ☐ Note the new employee’s NetID and pin from the automatic email sent by Client Accounts.<br>☐ Call to officially welcome the new hire to Yale:  
  • confirm acceptance;<br>  • confirm employee start date, time, and meeting location on first day;<br>  • provide your contact information in case the employee has questions before the start date; and<br>  • provide employee with their NetID and pin, and direct them to Workday via It’s Your Yale to complete inbox tasks (I-9, benefits, etc.) - WD Onboarding Guide<br>☐ For assistance, please contact Employee Services at employee.services@yale.edu or 203-432-5552. |
<p>| <strong>Department HR Specialist</strong>&lt;br&gt;- OR -&lt;br&gt;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):&lt;br&gt;☐ Laptop / Dock / Misc.&lt;br&gt;☐ Desktop&lt;br&gt;☐ 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.&lt;br&gt;☐ Request access for the following systems (if applicable):&lt;br&gt;☐ Desk phone&lt;br&gt;☐ Mobile phone&lt;br&gt;☐ Contact the ITS Helpdesk at 203-432-9000 or <a href="mailto:helpdesk@yale.edu">helpdesk@yale.edu</a> for access* to the following systems:&lt;br&gt;  * Review the former incumbent’s access to determine what access, if any, to request for the new employee&lt;br&gt;☐ FileNet&lt;br&gt;☐ Reporting&lt;br&gt;☐ Shared Drives&lt;br&gt;  (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)&lt;br&gt;☐ Access to the following systems is granted as outlined below:&lt;br&gt;☐ Workday (access granted after hire is processed and the new staff member’s NetID is generated)&lt;br&gt;  • 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.&lt;br&gt;☐ STARS (granted automatically upon start date)&lt;br&gt;☐ For temps/casuals, complete the Casual/Temporary ID Request Form.&lt;br&gt;☐ Miscellaneous access requests and additional tasks:&lt;br&gt;☐ Purchasing Card (submit Purchasing Card Request Form)&lt;br&gt;☐ Meeting / conference room booking access&lt;br&gt;☐ Other applicable systems (e.g., YBT, Hopper, Salesforce, IRES, Voyager)&lt;br&gt;☐ SharePoint (including department specific sites, if applicable)&lt;br&gt;☐ Prepare work space: clean, order supplies – paper, pens, keys, business cards (if applicable)&lt;br&gt;☐ Send an email to the department/building announcing the new employee&lt;br&gt;☐ Update any departmental directories not automatically updated by Workday |</p>
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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 Learning app within Workday and navigate to the learning catalog. |
| 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 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  
☐ Provide notice of employee rights under the Connecticut Family and Medical Leave Act and the Connecticut Paid Family Medical Leave Act: CT Annual Notice.  
☐ Provide notice that the University maintains policies pertaining to COVID-19. All faculty, staff, students, and trainees are required to comply with these policies, which may be found here. |