

Role	Steps to be Taken <u>Prior to</u> Employee's First Day
<p>Manager - OR - Designated Personnel within Department</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Note the new employee's NetID and pin from the automatic email sent by Client Accounts. <input type="checkbox"/> Call to officially welcome the new hire to Yale: <ul style="list-style-type: none"> • 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 to complete inbox tasks (I-9, benefits, etc.) - WD Onboarding Guide <input type="checkbox"/> For assistance, please contact Employee Services at employee.services@yale.edu or 203-432-5552.
<p>Department HR Specialist - OR - Designated Personnel within Department</p>	<ul style="list-style-type: none"> <input type="checkbox"/> 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 (<i>purchase through SciQuest accessed through Workday</i>): <ul style="list-style-type: none"> <input type="checkbox"/> Laptop / Dock / Misc. <input type="checkbox"/> Desktop <input type="checkbox"/> Schedule meeting with DSP (<i>if applicable</i>) on employee's first day to set up computer/printer. <i>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.</i> <input type="checkbox"/> Request access for the following systems (<i>if applicable</i>): <ul style="list-style-type: none"> <input type="checkbox"/> Desk phone <input type="checkbox"/> Mobile phone <input type="checkbox"/> Contact the ITS Helpdesk at 203-432-9000 or helpdesk@yale.edu for access* to the following systems: <ul style="list-style-type: none"> * <i>Review the former incumbent's access to determine what access, if any, to request for the new employee</i> <input type="checkbox"/> FileNet <input type="checkbox"/> Reporting <input type="checkbox"/> Shared Drives <p><i>(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)</i></p> <input type="checkbox"/> Access to the following systems is granted as outlined below: <ul style="list-style-type: none"> <input type="checkbox"/> Workday (<i>access granted after hire is processed and the new staff member's NetID is generated</i>) <ul style="list-style-type: none"> • Please note: <i>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.</i> <input type="checkbox"/> STARS (<i>granted automatically upon start date</i>) <input type="checkbox"/> Kronos (<i>granted automatically one day after start date</i>) <ul style="list-style-type: none"> • Send request to change timecard approver to employee.services@yale.edu (<i>if applicable</i>) <input type="checkbox"/> For temps/casuals, complete the Casual/ Temporary ID Request Form. <input type="checkbox"/> Miscellaneous access requests and additional tasks: <ul style="list-style-type: none"> <input type="checkbox"/> Purchasing Card (<i>submit Purchasing Card Request Form</i>) <input type="checkbox"/> Meeting / conference room booking access <input type="checkbox"/> Other applicable systems (e.g., YBT, Hopper, Salesforce, IRES, Voyager) <input type="checkbox"/> SharePoint (<i>including department specific sites, if applicable</i>) <input type="checkbox"/> Prepare work space: clean, order supplies – paper, pens, keys, business cards (<i>if applicable</i>) <input type="checkbox"/> Send an email to the department/building announcing the new employee <input type="checkbox"/> Update any departmental directories not automatically updated by Workday

Role	Steps to be Taken <u>On</u> Employee's First Day
Manager - OR - Designated Personnel within Department	<input type="checkbox"/> Review key policies (focusing on your specific department) <ul style="list-style-type: none"> <input type="checkbox"/> 90-day probationary period (<i>if applicable</i>) <input type="checkbox"/> Confidentiality <input type="checkbox"/> Dress code <input type="checkbox"/> Email and internet use <input type="checkbox"/> Emergency procedures <input type="checkbox"/> Time tracking and time off: Holidays, PTO, Sick leave, reporting absence, overtime (<i>if applicable</i>) <input type="checkbox"/> Injury prevention <input type="checkbox"/> Lateness policy <input type="checkbox"/> Performance reviews <input type="checkbox"/> Approving direct reports' time tracking (<i>if applicable</i>) <input type="checkbox"/> Place a reminder on your calendar to meet with the new employee upon completion of their first 30 days to: <ul style="list-style-type: none"> <input type="checkbox"/> Review observations, issues, and priorities <input type="checkbox"/> Continue to clarify roles, responsibilities, and expectations, as needed <input type="checkbox"/> Ensure any mandatory training has been completed <input type="checkbox"/> Answer questions and concerns about time tracking <input type="checkbox"/> For all managers who will be responsible for hiring and managing other Yale employees: <ul style="list-style-type: none"> <input type="checkbox"/> Ensure they are enrolled in the next available session of Managing at Yale Essentials. For more information, visit the TMS website. <input type="checkbox"/> 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	<input type="checkbox"/> 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 <ul style="list-style-type: none"> <input type="checkbox"/> Ensure that new employee completes their I-9 in Workday on their 1st day <input type="checkbox"/> 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 <input type="checkbox"/> Ensure DSP is scheduled to setup the following: <ul style="list-style-type: none"> <input type="checkbox"/> Map to printer <input type="checkbox"/> Map to Shared Drive <input type="checkbox"/> Offsite network access and instructions on remote access from home (laptop & pc) <input type="checkbox"/> Outlook (email, calendar); provide overview of calendar sharing <input type="checkbox"/> 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) <input type="checkbox"/> Review general information <ul style="list-style-type: none"> <input type="checkbox"/> Set up parking <input type="checkbox"/> Review It's Your Yale <ul style="list-style-type: none"> • Workday • My Time <input type="checkbox"/> Provide notice of employee rights under the Connecticut Family and Medical Leave Act and the Connecticut Paid Family Medical Leave Act: CT Annual Notice .