# Onboarding a New Employee Checklist

**Revised 3/16/2018**

<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 to complete inbox tasks (I-9, benefits, etc.) - WD Onboarding Guide  
☐ 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.  
☐ 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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<td>- ☐ Review key policies (focusing on your specific department)&lt;br&gt; 90-day probationary period <em>(if applicable)</em>&lt;br&gt; Confidentiality&lt;br&gt; Dress code&lt;br&gt; Email and internet use&lt;br&gt; Emergency procedures&lt;br&gt; Time tracking and time off: Holidays, PTO, Sick leave, reporting absence, overtime <em>(if applicable)</em>&lt;br&gt; Injury prevention&lt;br&gt; Lateness policy&lt;br&gt; Performance reviews&lt;br&gt; Approving direct reports’ time tracking <em>(if applicable)</em>&lt;br&gt; - ☐ Place a reminder on your calendar to meet with the new employee upon completion of their first 30 days to:&lt;br&gt;  - ☐ Review observations, issues, and priorities&lt;br&gt;  - ☐ Continue to clarify roles, responsibilities, and expectations, as needed&lt;br&gt;  - ☐ Ensure any mandatory training has been completed&lt;br&gt;  - ☐ Answer questions and concerns about time tracking</td>
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<td>- ☐ Direct new employee to Workday via <em>It’s Your Yale</em> <em>(if they haven’t already done so)</em> to complete I-9, benefits, tax forms, and other onboarding tasks that appear in the Workday inbox&lt;br&gt;  - ☐ Ensure that new employee completes their I-9 in Workday on their 1st day&lt;br&gt;  - ☐ 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&lt;br&gt; - ☐ Ensure DSP is scheduled to setup the following:&lt;br&gt;  - ☐ Map to printer&lt;br&gt;  - ☐ Map to Shared Drive&lt;br&gt;  - ☐ Offsite network access and instructions on remote access from home (laptop &amp; pc)&lt;br&gt;  - ☐ Outlook (email, calendar); provide overview of calendar sharing&lt;br&gt; - ☐ Have new employee obtain an ID card from the ID Center and, once obtained, request appropriate building access by emailing Access Control at <em><a href="mailto:432.open@yale.edu">432.open@yale.edu</a></em> <em>(Central Campus)</em> or <em><a href="mailto:785.open@yale.edu">785.open@yale.edu</a></em> <em>(Medical School Campus)</em>&lt;br&gt; - ☐ Review general information&lt;br&gt;  - ☐ Set up parking&lt;br&gt;  - ☐ Review <em>It’s Your Yale</em>&lt;br&gt;     - Workday&lt;br&gt;     - My Time</td>
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