# Onboarding a New Employee Checklist

**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;  
  - provide employee with their NetID and pin, and direct them to Workday via [It's Your Yale](https://workday.yale.edu) to complete inbox tasks (I-9, benefits, etc.) - [WD Onboarding Guide](https://workday.yale.edu).  
  - if the employee has job-related health requirements, direct them to login to [Workday](https://workday.yale.edu) to complete the annual compliance questionnaire prior to their start date.

- 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](https://workday.yale.edu)).
  - 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](https://workday.yale.edu).
  - STARS (granted automatically upon start date)

- For temps/casuals, complete the [Casual/ Temporary ID Request Form](https://workday.yale.edu).

- Miscellaneous access requests and additional tasks:
  - Purchasing Card (submit [Purchasing Card Request Form](https://workday.yale.edu))  
  - 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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<tr>
<th>Role</th>
<th>Steps to be Taken On Employee’s First Day</th>
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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)*  
☐ If the new hire has a job-related health requirement, direct them to login to Health On Track to complete health requirements  
☐ 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. |