## 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; and
  - provide employee with their NetID and pin, and direct them to Workday via [It’s Your Yale](https://it.yale.edu) to complete inbox tasks (I-9, benefits, etc.) - [WD Onboarding Guide](https://it.yale.edu)
- ☐ 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)
  - ☐ 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://it.yale.edu)
- ☐ Miscellaneous access requests and additional tasks:
  - ☐ Purchasing Card (submit [Purchasing Card Request Form](https://it.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)*  
- ☐ 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 |