

Role	Steps to be Taken <u>Prior to</u> Employee's First Day
Manager - OR - Designated Personnel within Department	<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; 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; and if the employee has job-related health requirements, direct them to login to Workday to complete the annual compliance questionnaire prior to their start date. <input type="checkbox"/> For assistance, please contact Employee Services at employee.services@yale.edu or 203-432-5552.
Department HR Specialist - OR - Designated Personnel within Department	<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. A <i>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: <i>* Review the former incumbent's access to determine what access, if any, to request for the new employee</i> <ul style="list-style-type: none"> <input type="checkbox"/> FileNet <input type="checkbox"/> Reporting <input type="checkbox"/> Shared Drives <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> <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: 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. <input type="checkbox"/> STARS (<i>granted automatically upon start date</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	<ul style="list-style-type: none"> <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"/> If the new hire has a job-related health requirement, direct them to login to Health On Track to complete health requirements <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 Learning app within Workday and navigate to the learning catalog.
Department HR Specialist - OR - Designated Personnel within Department	<ul style="list-style-type: none"> <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 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 <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. <input type="checkbox"/> 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.