# Onboarding a New Employee Checklist

**Revised 4/25/2023**

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<tr>
<th>Role</th>
<th>Steps to be Taken <em>Prior to</em> Employee’s First Day</th>
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<tr>
<td><strong>Manager</strong>&lt;br&gt;- OR -&lt;br&gt;Designated Personnel within Department</td>
<td>☐ Note the new employee’s NetID and pin from the automatic email sent by Client Accounts.&lt;br&gt;☐ Call to officially welcome the new hire to Yale:&lt;br&gt;  • confirm acceptance;&lt;br&gt;  • confirm employee start date, time, and meeting location on first day;&lt;br&gt;  • provide your contact information in case the employee has questions before the start date; and&lt;br&gt;  • provide employee with their NetID and pin, and direct them to Workday via <a href="#">It’s Your Yale</a> to complete inbox tasks (I-9, benefits, etc.) - <a href="#">WD Onboarding Guide</a>.&lt;br&gt;☐ For assistance, please contact Employee Services at <a href="mailto:employee.services@yale.edu">employee.services@yale.edu</a> or 203-432-5552.</td>
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<td><strong>Department HR Specialist</strong>&lt;br&gt;- OR -&lt;br&gt;Designated Personnel within Department</td>
<td>☐ 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 peripherals, if necessary, after consulting with DSP <em>(purchase through SciQuest accessed through Workday)</em>:&lt;br&gt;  ☐ Laptop / Dock / Misc.&lt;br&gt;  ☐ Desktop&lt;br&gt;☐ Schedule meeting with DSP <em>(if applicable)</em> on employee’s first day to set up computer/printer. <em>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.</em>&lt;br&gt;☐ Request access for the following systems <em>(if applicable)</em>:&lt;br&gt;  ☐ Desk phone&lt;br&gt;  ☐ Mobile phone&lt;br&gt;☐ Contact the ITS Helpdesk at 203-432-9000 or <a href="mailto:helpdesk@yale.edu">helpdesk@yale.edu</a> for access* to the following systems:&lt;br&gt;  * Review the former incumbent’s access to determine what access, if any, to request for the new employee&lt;br&gt;    ☐ FileNet&lt;br&gt;    ☐ Reporting&lt;br&gt;    ☐ Shared Drives&lt;br&gt;  <em>(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)</em>&lt;br&gt;☐ Access to the following systems is granted as outlined below:&lt;br&gt;  ☐ Workday <em>(access granted after hire is processed and the new staff member’s NetID is generated)</em>&lt;br&gt;    • Please note: If specific role assignments are required, role requests can be submitted within Workday using the instructions outlined in the <a href="#">Managing Roles in Workday training guide</a>.&lt;br&gt;  ☐ STARS <em>(granted automatically upon start date)</em>&lt;br&gt;  ☐ Kronos <em>(granted automatically one day after start date)</em>&lt;br&gt;    • Send request to change timecard approver to <a href="mailto:employee.services@yale.edu">employee.services@yale.edu</a> <em>(if applicable)</em>&lt;br&gt;☐ For temps/casuals, complete the <a href="#">Casual/ Temporary ID Request Form</a>.&lt;br&gt;☐ Miscellaneous access requests and additional tasks:&lt;br&gt;  ☐ Purchasing Card <em>(submit <a href="#">Purchasing Card Request Form</a>)</em>&lt;br&gt;  ☐ Meeting / conference room booking access&lt;br&gt;  ☐ Other applicable systems (e.g., YBT, Hopper, Salesforce, IRES, Voyager)&lt;br&gt;  ☐ SharePoint <em>(including department specific sites, if applicable)</em>&lt;br&gt;  ☐ Prepare work space: clean, order supplies – paper, pens, keys, business cards <em>(if applicable)</em>&lt;br&gt;  ☐ Send an email to the department/building announcing the new employee&lt;br&gt;  ☐ Update any departmental directories not automatically updated by Workday</td>
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<tr>
<td>Role</td>
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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  
☐ 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](#)*. |