

New Faculty Checklist – Non-YSM Schools

FACULTY MEMBER INFORMATION			
Name:		Start date:	
Position:		Netid:	
PRIOR TO FACULTY MEMBER'S FIRST DAY			
	Send Data Collection Form (https://facultyadmin.yale.edu/data-collection-form-personal-data) to the faculty member to collect personal information. You will use this information to create the Employee record in Workday.		
	Upon approval of the faculty member's hire in Workday, you may begin requesting access to Yale systems as needed. Refer to Form 3503 FR.01 Onboarding a New Employee Checklist (https://your.yale.edu/policies-procedures/3503-fr01-onboarding-a-new-employee-checklist) for suggested areas. Note: The PIN for the netid can be requested 180 days in advance of the hire date. (Refer to ITS webpage, NetID & Password Management. Under "Service Requests and Access Links", click Generate Pin Request.)		
	Send template email to officially welcome the new faculty member to Yale after confirmation of acceptance.		
	Pass along orientation information if known. Details, when known, will be posted on the Provost's Office website .		
	Strongly encourage the faculty member to complete the onboarding process in Workday, i.e. verify that the I-9, tax withholding, direct deposit forms have been completed, and, if applicable, he or she has made benefits selections.		
	If required, order new computer.		
	Set up new faculty member's computer. If there is any possibility that the new faculty member <u>may</u> use the computer to create, store, access, transmit or receive protected health information (ePHI), notify your DSP or ITS Partner via email to apply the appropriate security measures.		
	If required, order new smartphone. If there is any possibility that the new faculty member <u>may</u> use the computer to create, store, access, transmit or receive protected health information (ePHI), notify your DSP or ITS Partner via email to apply the appropriate security measures.		
	Set up key items on computer (e.g. Yale website, It's Your Yale, department website, Office of the Provost website), or send the faculty member a list of important sites to bookmark.		
	Set up new faculty member's desk phone and printer.		
	Take a supply order and order supplies, e.g. paper, pens, business cards, privacy screens, locking cables, etc.		
	Provide access, card or key(s): Building _____ Office _____ Lab _____		
	Prepare the new faculty member's office/work space by making sure that the furniture is adequate and that it is clean and ready.		
	Send an informal announcement (via e-mail) to the department announcing the new faculty member.		
	Add the faculty member to the school or department website and/or directory.		
	Schedule uninterrupted time to meet with new faculty member and orient her or him to your department and Yale. At this time, verify that the I-9 has been completed in Workday.		
	Direct the faculty member to an I-9 Center to complete the process. Must be done prior to the 3 rd day of work.		
	Direct the faculty member to the ID Center to obtain a Yale ID card.		

FACULTY MEMBER'S FIRST DAY

INTRODUCTION TO DEPARTMENT

Orientation to:	☐ Building including such items as access times, common spaces and meeting rooms, restrooms, and emergency exits. ☐ Staff in the department including roles and responsibilities. ☐ Surrounding area including eateries, supplies, and local idiosyncrasies.	
Review general information as applicable to the department or the individual	☐ Office/desk/work station ☐ ID card ☐ Building access/security ☐ Keys (if applicable) ☐ Conference/meeting rooms scheduling ☐ Copying and printing ☐ Office supplies	☐ Handling confidential information ☐ Important telephone numbers, including new faculty member's ☐ Mail (incoming and outgoing) ☐ Expense reports ☐ Purchase requests/P-Card ☐ Shipping (FedEx, DHL, and UPS) ☐ Kronos, if supervising non-exempt staff

UPDATE PERSONAL INFORMATION

Refer the faculty member to Workday to complete their onboarding tasks:	☐ - Go to https://your.yale.edu/ and select Workday. ☐ - Click the My Tasks inbox in the upper-right corner.
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COMPUTERS AND TELEPHONE

Hardware and software reviews, including:	☐ E-mail or Outlook ☐ Calendar software ☐ Ensure computer is secure ☐ Ensure smartphone is secure	☐ Shared server, if applicable ☐ How to use telephone system ☐ How to setup voicemail ☐ How to use telephone system
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POLICIES

Provide links to:	Office of the Provost, https://provost.yale.edu
	ITS secure computing policies, https://cybersecurity.yale.edu/
	If applicable, HIPAA policies and guidelines, https://hipaa.yale.edu/policies-procedures-forms

CHECK-IN AFTER 30 DAYS

Email new faculty member at the end of first 30 days to:	☐ Review observations, issues and priorities ☐ Ensure mandatory training has been completed, such as the HIPAA Privacy & HIPAA security training or lab safety training. ☐ Ensure the HIPAA Attestation has been completed
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Resources for Managers

[Employee Service Center](#)

432-5552

employee.services@yale.edu

[Yale ID Center](#)

432-0165

id.center@yale.edu

[Parking](#)

432-9790

parking@yale.edu

[ITS/Telecom Help Desk](#)

432-9000

helpdesk@yale.edu

[Faculty Administrative Services](#)

Staff Directory

faculty.admin@yale.edu

<https://facultyadmin.yale.edu/contact>