

YMA Onboarding Guide: Permanent Staff (New Hires & Transfers)

Employee Name:

Title:

Start Date:

Manager Name:

Department Name:

For general assistance, please contact Employee Services at employee.services@yale.edu or 203-432-5552 and/or the ITS Help Desk at helpdesk@yale.edu or 203-432-9000

ROLE	STEPS TO BE TAKEN <u>PRIOR</u> TO EMPLOYEE'S FIRST DAY
Manager	☐ Manager receives new hire's NetID and pin from automatic email sent by Client Accounts. <i>If email is not received in timely manner, contact the ITS Help Desk at helpdesk@yale.edu or 203-432-9000.</i> Please note, this does not occur for transfers. ☐ Call to officially welcome the new hire or transfer to Yale Medicine: ☐ Confirm employee start date, time, and meeting location on first day; ☐ Review Campus Health information here to ensure the new hire is compliant with the University's health and safety requirements for staff; ☐ Make employee aware that they will be attending two orientations – Yale New Employee Orientation and YM We Care Orientation; ☐ Provide your contact information in case the employee has questions before the start date; and ☐ Forward to the new hire the email received from ITS containing new employee's NetID, pin, email address and Workday Onboarding instructions (outlined in WD Onboarding Guide) ☐ Direct employee to log into Yale's Health On Track site to review their role-related requirements. ☐ For out-of-state employees, inform them not to discard the boxes their computer equipment arrives in. If any items need to be returned for any reason including damage or defects, these boxes should be used for the return shipment. ☐ Prepare and coordinate orientation plan to include trainings and Meet & Greet: • Provide list of training courses on YM Learning Academy's Open Registration Curriculum (required) and technology training (if applicable) • Provide list of Yale's Managing at Yale courses for new managers (mandatory) • Identify parties for Meet & Greet ☐ Distribute announcement of employee to department <u>Template Announcement:</u> I am pleased to announce that _____ will be joining _____ on Day, Month Year, as a/an _____. In this role, _____ will be responsible for _____. He/She will report to me and be located at _____. (For Internal Transfers) _____ joined Yale in _____, where he/she has worked in _____ as a/an _____. Some of his/her responsibilities there included _____. Prior to joining Yale, _____ worked at _____ where he/she was responsible for _____. _____ holds a _____ degree in _____ from _____.

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Manager's Designated Senior Administrative Assistant	Computer and Phone Requests:
	☐ 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: ☐ Laptop / Dock / Misc. ☐ Desktop ☐ Schedule meeting with DSP on employee's first day to set up computer and map equipment to printer(s) and shared drives. <i>For transfers: note that DSP will need to transfer files, downloads, favorites, etc. from the previous computer hard drive over to new equipment.</i>
Manager - OR - Manager's Designated Senior Administrative Assistant	☐ Request Softphone and/or Mobile phone via ITS Service Portal (if applicable): ☐ Softphones (replicates a Desk Phone using your computer) ☐ Select – Request a telephone set, line, or Feature. ☐ Complete the form using the following guidance and submit: ▪ Under Telephone Request Type select – “Add (Phone line, Desk phone or Softphone)” ▪ Under Options select – “Softphone Line (Microsoft Teams) ▪ For field “Will the soft phone use a new or existing phone line?” select – “New Line” ▪ For COA field - retrieve appropriate COA from YM Finance (nicholas.nemergut@yale.edu) ▪ In the comment section specify that you are requesting a Teams Client softphone. ☐ Mobile Phones (if applicable)
Manager's Designated Senior Administrative Assistant	Systems Access Requests: <i>Please note: It can take up to a week to obtain access to some systems, so please submit requests as soon as you are aware of the new employee's start date and NetID.</i> <i>Tip: Review the former incumbent's access to determine what access, if any, to request</i> ☐ Contact the ITS Help Desk for access to the following: ☐ Reporting ☐ Shared Drives – include title of drive and privileges (read/write, read only) ☐ Meeting/conference room booking privileges ☐ Access to the following systems is granted as outlined below: ☐ Workday: access granted after hire is processed and the NetID is generated ☐ Miscellaneous access requests and additional tasks: ☐ Other applicable systems (e.g., Epic, Managed Care Website) ☐ For employees that need Epic access: ▪ Request Epic User ID: access requests make take up to 10-15 days. To request an Epic ID, submit to the Yale New Haven Health Help Desk (helpdesk@ynhh.org) a completed Access Service Request Form

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	▪ Schedule Epic Training based on Role: User ID request must be completed before scheduling. Class schedules can be viewed on the LMS found HERE. Scheduling requests should be sent to EpicTraining@ynhh.org with the person's name, Epic User ID and desired class. □ For employees that need Managed Care Website access – submit completed Managed Care Website Access Form to carrierwebsiterequests@yale.edu. □ Prepare work space: clean, create desk/office name label, order supplies such as headset, desk or office keys. □ Update any department directories not automatically updated by Workday □ Order business cards via YPPS. (if applicable – see below for parameters) □ The need for purchasing business cards should be determined by job function. If new hire's business interactions are mostly virtual, cards should <u>not</u> be purchased. ▪ <i>Examples of preapproved roles include:</i> <i>Sr. Nurse Managers, Sr. Practice Managers</i>
ROLE	STEPS TO BE TAKEN <u>ON</u> EMPLOYEE'S FIRST DAY
Manager	Meet with employee to review the following: □ Ensure New Employee hiring forms are completed: • Direct new employee to Workday via It's Your Yale to complete I-9, benefits, tax forms, and other onboarding tasks that appear in their 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 start date • Please note Yale's I-9 Centers and List of Acceptable Documents □ Review general information: □ Parking and Yale Shuttle information □ It's Your Yale □ Review key Policies and Processes (focusing on your specific department): □ 90-day probationary period (if applicable) □ <u>Yale Medicine Administration's Staff Policies & Guidelines:</u> □ Summary of Staff Expectations □ Standards of Professional Behavior □ Dress Code and/or Clinic Standard of Appearance Guidelines □ Prohibited Appliances □ Email Etiquette and Meeting Etiquette Guidelines □ Cell Phone Distribution Policy (if applicable) □ Emergency Procedures (for building and university) □ Advise on Annual Performance Review Process □ Time tracking and time off: Holidays, reporting absence, etc. □ Review weekly timecard approval process and direct to Workday Time & Absence training resources • C&T employees - submit timecards on the last day worked in the pay period, which is the end of the day on Fridays. Managers should be approving by the end of the day on Mondays for the previous week. • M&P employees - request time off only. Managerial and Professional staff no longer enter a monthly timesheet. □ Manager's Role in Ensuring Accurate Timekeeping: managers of C&T staff are responsible for reviewing timecards for accuracy, adding a comment for non-standard work weeks, and approving on Mondays for the previous week. • Ensuring accurate pay for hourly employees to comply with state and federal laws: ○ This includes that all overtime recorded is accurate.

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	○ Confirm that no day is marked as both a full day worked and a full day off. • Adding a comment to non-standard work weeks: ○ If an employee's work week totals more than 37.5 hours, you must enter a note in the comment box before approving the timecard. For example, if overtime was preapproved, please add this to the comment section. Similarly, if there's a specific situation in which you received HR guidance and approval, please add this to the comments as well. With the proper justification, the business office won't need to reach out to you each week to verify accuracy. • Timely approvals: ○ Employees should submit their timecards on the last day worked in the pay period, which is the end of the day on Friday. ○ Managers should review and approve employee timecards by the end of the day on Monday for the previous week. If you will be away, please assign a delegate to review and approve on your behalf. ☐ If applicable, notify Finance (nicholas.nemergut@yale.edu) to start process for obtaining University Purchasing Card (P-Card) for new employee. Review documents received from Finance (YMA PCard and Expense Submission Policy, Yale PCard Training PPT, Tax Exempt Permit and <i>YMA Corporate Credit Card Agreement</i>). Submit signed <i>YMA Corporate Credit Card Agreement</i> to Finance ☐ If new employee will be managing staff (supervisor): ☐ Provide and review New Manager Fact Sheet ☐ Review approving direct reports' time tracking (Workday) ☐ Review the information on Yale's Cybersecurity 101 site ☐ YM Branding Resources, Signature and Work Contact information: ☐ Ensure employee reviews Yale Medicine Branding guidelines ☐ Provide employee with Yale Medicine signature template ☐ Remind employee to update contact information (desk phone number) in Workday, using the Personal Information worklet
Manager - OR - Manager's Designated Senior Administrative Assistant Manager's Designated Senior Administrative Assistant	☐ Yale ID Card and Building Access: ☐ Direct new employee to obtain a Yale ID card from an ID Center ○ Employee will need proof of identification in the form of ID ☐ Once obtained, manager should notify Sr. Administrative Assistant to request building access. Manager should include Proxy # on back of Yale ID. ○ Sr. Administrative Assistant to request appropriate building access by emailing Access Control at 432.open@yale.edu with details of the needed access, employee name, and proxy # found on back of ID card. ☐ Ensure DSP is scheduled to setup the following: ☐ Map equipment to printer(s) ☐ Map equipment to Shared Drive(s) ☐ Offsite network access and instructions on remote access from home ☐ Outlook (email, calendar); provide overview of calendar sharing, room booking, etc.

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Manager	☐ Introductions and Tours: ☐ Provide tour of department facility and workstation, to include: restrooms, printer/mail room, copy/fax machine, office supplies, water/coffee area, exits ☐ Introduce employee to colleagues ☐ Place a reminder on your calendar to meet with the new employee upon completion of their first 30-60-90 days (see 30-60-90 Day Discussion Guidelines). ☐ Upon Completion of their first 30 days: ☐ 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 ☐ Schedule a series of frequent one on meetings ☐ For new managers, verify that employee has either registered or completed mandatory Managing at Yale courses.
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Scope

This document is applicable to all Managers of Staff reporting to Yale Medicine Administration (YMA)

Contact Information

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