The following checklist is to be used to safeguard access to confidential information when employment begins as well as outline the general process for new employees.

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| **Onboarding Checklist**  *Document of Record for onboarding a new workforce member or consultant.* | | | |
| **Name** |  | **Date of Onboarding** |  |
| **Title** |  | | |
| **Relationship** | Employee or  Consultant | | |

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| **General** | |
| **Setup employee’s payroll and tax forms.** | **HR / COO** |
| **Issue appropriate equipment and items: Workstation, mobile phone, credit card, etc.** | **Supervisor** |
| **Setup employee’s access to facility and notify employee of related policies and procedures.** | **Supervisor** |
| **Training** | |
| **HIPAA Training** | **Privacy Officer** |
| **Policies and Procedures** | **Privacy Officer** |
| **Employee Handbook** | **Employee** |
| **Responsibilities and acceptable behavior with workstation and other devices.** | **Privacy Officer** |
| **Remote workforce training including risks, controls, and responsibilities.** | **Privacy Officer** |
| **Information Systems** | |
| **Grant Employee access to Google Apps (email, calendar, gDrive, etc).** | **Security Officer** |
| **Grant Employee access to Github.** | **Security Officer** |
| **Fill out System Access Request Form as needed.** | **Employee** |
| **Grant access to systems after System Access Form reviewed and approved.** | **Security Officer** |
| **Add Employee to appropriate Calendar Invites** | **Supervisor** |

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| **Authorization** *(to be filled out by Privacy Officer and/or Security Officer)* | | |
| **Name Completed By** |  | Date: |
| **Title** |  | |