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| **New Faculty Checklist – Non-YSM Schools** | | | | |
| **FACULTY MEMBER INFORMATION** | | | | |
| Name: | |  | Start date: |  |
| Position: | |  | Netid: |  |
| **PRIOR TO FACULTY MEMBER’S FIRST DAY** | | | | |
|  | Send Faculty Data Collection Form, part 2 (<http://facultyadmin.yale.edu/faculty-forms-and-their-uses>) to the faculty member to collect personal information. You will use this information to create the HR record in Workday. | | | |
|  | Submit START request to obtain access, as needed. This can be done as soon as the faculty member’s employee record is approved in Workday.  PIN for the netid (can be requested 90 days in advance of start date)  Time Entry (Kronos)  Other User Accounts (e.g. START, TSM, etc.) | | | |
|  | Send [template email](http://facultyadmin.yale.edu/template-email-new-faculty) 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](http://provost.yale.edu/faculty-resources/faculty-development-and-diversity). | | | |
|  | Verify that the faculty member has signed into Workday to complete the onboarding process, 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 Managed Workstation via SciQuest (<http://yalebiz.yale.edu/transactions/sciquest>) under the NETID and user name of the new faculty member. | | | |
|  | Set up new faculty member’s computer.  If there is any possibility that the new faculty member may use the computer to create, store, access, transmit or receive health information (ePHI), notify your DSP or ITS Partner via email to apply the appropriate security measures (otherwise known as encrypting and applying the “3-lock stamp.”) *NOTE: Encryption can take up to 24 hours to complete.* | | | |
|  | If required, order any new smartphones via START (<http://yalebiz.yale.edu/transactions/start>). Ordering and breach prevention guidelines are available at <http://hipaa.yale.edu/security/breach-prevention/smartphones>  If there is any possibility that the new faculty member may use the phone to create, store, access, transmit or receive health information (ePHI), including email, the device will need to be a conforming device. Notify your DSP or ITS Partner via email when a new smartphone is ordered (or for one that is personally owned) that is/will be used to create, store, access, transmit or receive ePHI. | | | |
|  | Set up key items on computer (e.g. Yale website, faculty portal, faculty gateway, 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. | | | |
|  | Direct the faculty member to the ID Center to obtain a Yale ID card. | | | |

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| **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  Keys (if applicable)  Building access/security  ID card  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 review and update his or her information.: | | - Log into Yale portal: <http://portal.yale.edu/> .   - Select “My Pay and Info” from the “My Yale” box.   - Select the Personal Information worklet, verify the information, and make updates if needed. | | | | | | | |
| **COMPUTERS AND TELEPHONE** | | | | | | | | | |
| Hardware and software reviews, including: | | E-mail or Outlook  Calendar software  Ensure computer has 3-lock stamp applied if using ePHI | | | | Shared server, if applicable  How to setup voicemail  How to use telephone system  Ensure smartphone is secured | | | |
| **POLICIES** | | | | | | | | | |
| Provide links to: | | Office of the Provost, <http://provost.yale.edu> | | | | | | | |
| ITS secure computing policies, <http://its.yale.edu/forms-policies/policies> | | | | | | | |
| If applicable, HIPAA policies and guidelines, <http://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 | | | | | | | | |
| **Resources for Managers** | | |  |  | | | |  | |
| [Employee Service Center](http://www.yale.edu/hronline/employeeservices/) | | | 432‐5552 | | | | [employee.services@yale.edu](mailto:employee.services@yale.edu) | |
| [Yale ID Center](http://idcenter.yale.edu/) | | | 432‐0165 | | | | [id.center@yale.edu](mailto:id.center@yale.edu) | |
| [Parking](http://to.yale.edu/drive) | | | 432‐9790 | | | | [parking@yale.edu](mailto:parking@yale.edu) | |
| [ITS/Telecom Help Desk](http://its.yale.edu/help) | | | 432‐9000 | | | | [helpdesk@yale.edu](mailto:helpdesk@yale.edu) | |
| [Faculty Administrative Services](http://facultyadmin.yale.edu/) | | | Staff Directory <http://facultyadmin.yale.edu/contact> | | | | [faculty.admin@yale.edu](mailto:faculty.admin@yale.edu) | |