|  |  |  |  |
| --- | --- | --- | --- |
| ONBOARDING CHECKLIST | | | |
|  | **Task** | **Notes** | **Additional Info.** |
|  | Identify and check the office area:   * Furniture, monitors, computer/laptop, and other equipment needed * Cleanliness of office * Active data points, phone jack, if applicable * Computers/laptops scrubbed | Contact UTMB’s Help Desk when computer/laptop scrub is needed, (409) 772-5200 or [Help Desk](https://utmb.saasit.com/Default.aspx) . |  |
|  | If new employee is a without salary (WOS) position:   * IS non-disclosure form may be needed (generally for faculty only) | [Nondisclosure Form](https://itim.utmb.edu/forms/UTMBEmployeeNondisclosure.pdf) |  |
|  | Order badge (credentials must be included, if applicable) and key via Key Control Officer (KCO) in appropriate area:   * Provide faculty member with faculty label for badge holder * Request access to department (conference rooms, offices, building doors) * Request access to other departments/buildings, etc. if applicable | Contact Shirley McGraw for resource for badge label  If access is needed in other areas, please work with the appropriate KCO. For listing of KCOs, [Active KCO Listing](https://intranet.utmb.edu/kco/) |  |
|  | Trusted Requestor (TR) will submit Tivoli request:   * Email, Zoom, VPN, shared drive departmental folders, EPIC access, etc. (mirror the access of an employee in a similar role) * Blackboard courses (need username), if applicable * Exam Driver (need email), if applicable | To find TR - [Trusted Requestor](https://itim.utmb.edu/) |  |
|  | Request POWER Travel & Entertainment and Procurement Training if needed. | [POWER T&E and Procurement Training Request Form](https://nam11.safelinks.protection.outlook.com/?url=https%3A%2F%2Fapp.smartsheet.com%2Fb%2Fform%2F9ec3e3ca307b40a999654dbfe012fd82&data=05%7C01%7Cdsharris%40UTMB.EDU%7Cd826ba784f294e791b9408dbf5116488%7C7bef256d85db4526a72d31aea2546852%7C0%7C0%7C638373227264901523%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1haWwiLCJXVCI6Mn0%3D%7C3000%7C%7C%7C&sdata=eRF3836XgdDQDAmEba2cmfk2JYqAxTkAaOp%2BLPZCHz8%3D&reserved=0) |  |
|  | Add new employee/faculty to:   * Call tree and send updates to JSSOM/VDAA office * School of Medicine Academic Affairs email group and other applicable email groups; applicable department lists * Copier machine (need username and ID number) * Departmental mailboxes, if applicable * Teams phone set up * Signature authority | Contact Lori DeWillis, [Lori DeWillis](mailto:ailto:lkdewill@utmb.edu?subject=New%20Employee) or [Zelma Bocanegra](mailto:zrbocane@utmb.edu?subject=New%20Employee) to add to SOM Academic Affairs group  For Teams set up – (Verify if new Teams phone number is needed or if there is unused number available) [IT Services](https://intranet.utmb.edu/it-services/divisions/operations/network-phone-video/voice-ops/telephone-data-cable)  [Signature Authority](https://webforms.utmb.edu/frevvo/web/tn/forms/user/giflynn/app/_EmoUgEJ8EeisDaZ4LyH54Q/flowtype/_lUlwcEjHEeigyc4jrxJYoQ/popupform) |  |
|  | Order:   * Business cards, if applicable * White coat (faculty) * Academic Affairs polo shirt * Additional supplies as requested | Send size and style to [Zelma Bocanegra](mailto:zrbocane@utmb.edu?subject=New%20Employee) for AA shirt |  |
|  | Create folder for new staff member to include:   * Job description * UTMB and JSSOM’s organizational chart * Fire plan * Appropriate Business Continuity Plan * Appropriate call tree | [Business Continuity Plan](https://liveutmb.sharepoint.com/sites/collaboration/SOM-AcademicAffairs/Emergency%20Planning/Forms/AllItems.aspx?ga=1&id=%2Fsites%2Fcollaboration%2FSOM%2DAcademicAffairs%2FEmergency%20Planning%2FSOM%2DAA%20EMERGENCY%20PLANNING%20%28current%29%2FBusiness%20Continuity%20Plans%2FCURRENT%2FAA%20%28AA%2C%20OEA%2C%20OSAA%2C%20PAS%29%202023%20BCP%2Epdf&viewid=2b97c829%2Dd4f7%2D4531%2D89d4%2Dcb7cadd59c3d&parent=%2Fsites%2Fcollaboration%2FSOM%2DAcademicAffairs%2FEmergency%20Planning%2FSOM%2DAA%20EMERGENCY%20PLANNING%25https://liveutmb.sharepoint.com/sites/collaboration/SOM-AcademicAffairs/Emergency%20Planning/Forms/AllItems.aspx?ga=1&id=%2Fsites%2Fcollaboration%2FSOM%2DAcademicAffairs%2FEmergency%20Planning%2FSOM%2DAA%20EMERGENCY%20PLANNING%20%28current%29%2FBusiness%20Continuity%20Plans%2FCURRENT&viewid=2b97c829%2Dd4f7%2D4531%2D89d4%2Dcb7cadd59c3d)  [Call Trees](https://liveutmb.sharepoint.com/sites/collaboration/SOM-AcademicAffairs/Emergency%20Planning/Forms/AllItems.aspx?ga=1&id=%2Fsites%2Fcollaboration%2FSOM%2DAcademicAffairs%2FEmergency%20Planning%2FSOM%2DAA%20EMERGENCY%20PLANNING%20%28current%29%2FCall%20Trees%2FCURRENT&viewid=2b97c829%2Dd4f7%2D4531%2D89d4%2Dcb7cadd59c3d) |  |
|  | Schedule orientation, if applicable | Confirm employee receives email with scheduled orientation date. If necessary, reschedule or make arrangements to do via Zoom |  |
|  | Complete equipment loan form | [WebForms](https://webforms.utmb.edu/frevvo/web/tn/forms/subject/current/tasks?submissionState=PENDING&task.popup=false) |  |
|  | Photo and short bio sketch needed for welcome announcement email to all JSSOM Academic Affairs group within ten business days of start date | Each area is responsible for sending out the welcome email for the new employees |  |
|  | Provide information and overview of Kronos and complete training, if applicable | [Kronos Training](https://intranet.utmb.edu/emr/current-offerings/mypto-kronos-systems-training);  For FAQs - [Kronos FAQs](https://www.utmb.edu/time/) |  |
|  | Update UTMB CV to include UTMB position (faculty) | For new hires, submit in POWER (under Plan, candidate, position, offer attachments); also needs to be updated and submitted to Faculty Relations annually – CVs are posted under Sharepoint for each area |  |
|  | Complete online compliance training within 30 days of employment | UTMBLearn, [Web Login Service (utmb.edu)](https://idp.utmb.edu/idp/profile/SAML2/Redirect/SSO?execution=e1s1) |  |
|  | Introduce new employee to team members as appropriate |  |  |
|  | Employee is responsible for picking up UTMB badge (take photo identification) | 2nd Floor Rebecca Sealy |  |
|  | Arrange parking via UTMB Parking | Employee may pre-fill forms online. UTMB Campus Store, 1st Floor John Sealy, [Galveston Employee Parking (utmb.edu)](https://www.utmb.edu/auxiliaryenterprises/utmbparking/employee-parking/galveston-employee-parking) |  |
|  | Pick up keys | When UTMB email is received, employee must pick up at key office on 2nd Floor Rebecca Sealy within 10 days. |  |
|  | Verify UTMB’s Directory Listing is correct – employee should check to make sure information in directory is correct |  |  |
|  | TDC Clearance, if applicable | [TDCJ](http://www.utmb.edu/tdcj/) |  |
|  | Make appointment to have professional photo taken for department’s website | Mark Kinonen (x23711) or [mskinone@utmb.edu](mailto:mskinone@utmb.edu) |  |
|  | Bio sketch for website needed from employee, if applicable |  |  |
|  | Professional photo and bio sketch sent to JSSOM webmaster to update website | Mary Jo Singleton, [madsingl@utmb.edu](mailto:madsingl@utmb.edu) |  |
|  | New faculty members are briefed on travel/CME/business allowances, POWER matrix, information on teaching quality goals and group goals for current year, if applicable. |  |  |
|  | Update Webtrax and computer reconciliation file | Contact [Shirley McGraw](mailto:smcgraw@utmb.edu), [Debbie Harris](mailto:dsharris@utmb.edu) or [Lori DeWillis](mailto:ailto:lkdewill@utmb.edu?subject=New%20Employee) -  [Webtrax](https://webtrax.utmb.edu/) |  |
|  | PAS only:   * Complete ARC-PA faculty change form and CV and submit to SOM Dean * Submit faculty change form and CV to ARC-PA portal * Add name to ARC-PA portal * Add name to PAEA roster * Request access to PAS suite (conference rooms and back door) | [PAS Change Form](https://www.arc-pa.org/?s=faculty+change)  [PAS Portal](https://portal.arc-pa.org/Pages/Login.aspx?ReturnUrl=%2fPages%2fPrograms%2fProgramDashboard.aspx)  [PAEA Roster](https://members.paeaonline.org/s/login/?ec=302&startURL=%2Fs%2F) |  |
| EXIT CHECKLIST | | | |
|  | **Task** | **Notes** | **Additional Info.** |
|  | Remove former employee’s:   * Sign from door, if applicable * Name/email address from list servers * Name from call tree and send updates to JSSOM/VDAA office * Access from copier machine (need username and ID number), if applicable * Blackboard courses (need username), if applicable * Access from testing software, if applicable (need email) |  |  |
|  | Verify employee’s job-related files are on shared drive for future access before employee’s last day |  |  |
|  | Have IS scrub computer |  |  |
|  | After making copy of Tivoli access for replacement position, remove access for IT, email, etc. in Tivoli (transfers) | ttps://itim.utmb.edu/ |  |
|  | Send employee exit checklist:   * When returned, sign and scan email copy to Human Resources | [Human Resources - UTMB Employee Exit Checklist.pdf - All Documents (sharepoint.com)](https://liveutmb.sharepoint.com/sites/collaboration/HumanResources/Web/Forms/AllItems.aspx?id=%2Fsites%2Fcollaboration%2FHumanResources%2FWeb%2FEmployee%20Resources%2FUTMB%20Employee%20Exit%20Checklist%2Epdf&parent=%2Fsites%2Fcollaboration%2FHumanResources%2FWeb%2FEmployee%20Resources&p=true&ga=1) |  |
|  | Notify webmaster to remove former employee’s information and update website as needed. Specific url address and instruction should be included. | Mary Jo Singleton, [madsingl@utmb.edu](mailto:madsingl@utmb.edu) |  |
|  | Contact IT regarding the possibility of maintaining same phone number - if position remains vacant for extended time, may need to deactivate jack |  |  |
|  | Update resignation/termination/new appointment information with accreditation, national and state affiliations, as required |  |  |
|  | Remove/Update Webtrax and computer reconciliation file | <https://webtrax.utmb.edu/> |  |
|  | Return all UTMB equipment and items (may include textbooks purchased with UTMB funds) |  |  |

Checklist is intended as a helpful tool for onboarding new employees and exiting employees. Edits/additions should be sent to [Debbie Harris](mailto:dsharris@utmb.edu).