College Onboarding Procedures

College onboarding procedures

This page describes the processes for completing onboarding tasks once a new employee’s hire process has been completed in Workday. All processes described on this page are separate from and outside of Workday. In addition to the steps below, new hires should also complete any internal onboarding procedures you may already have within your unit. Managers should review with their employees any specific policies pertaining to the position or unit.

1) Human Resources procedures

Actions for Employee and Manager Together

1) NEWO: If employee is new to UT or returning after a significant break in service, they should attend a New Employee Welcome and Orientation (NEWO) session.

2) Review New Employee resources – central HR. Includes New Employee Welcome and Orientation (NEWO) information and registration, New Employee Resources (insurance, retirement, leave, etc.), and Transfer of Prior State Service Credit and Leave Balances.

3) Review and complete New Employee Checklist.

4) Review Probationary Employee information (if applicable). New, classified employees are considered probationary employees for the first 180 days of university employment as part of the selection and hiring process. (A&P employees do not have a Probation period, but are disallowed from using vacation time during their first six months of employment.)
   • Policies
   • Tips

5) New faculty hires only: Review Faculty Salary Spread option with faculty member, and if they wish to participate, direct them to submit the Salary Spread Request Form to Payroll Services by August 31 for fall hires, or January 15 for spring hires.

Actions for New Employee

1) Review and update personal information in Workday using COE Workday Go-Live checklist.

2) If a nonpayroll payment is expected, such as for financial aid, student payments, reimbursements, refunds, or scholarships, set up direct deposit at My Bank Information in UT Direct. Payroll direct deposit information must be added or updated in Workday and is part of the employee’s Workday onboarding tasks.

3) Complete this online form to report their current or prior participation in the Teacher Retirement System of Texas (TRS).

While new hires can begin their onboarding tasks before their first day of work, several tasks such as Payment and Withholding Elections, found in the Pay worklet, only become available on the new hire’s first day of work. For more information on which tasks are available to new hires before their first day of work, review the Onboarding Workday Process Overview (WPO).

2) Key requests

Action for Manager

• For SZB: Sanchez (SZB) Building Key requests (page access restricted to key signers)
  • To request page access, please contact COEFacilities@austin.utexas.edu
• Other buildings and work spaces: Follow local procedures

Resources

• Campus Lock & Key Services
• Sanchez (SZB) Building directions and map
• Sanchez (SZB) Building info
• Bellmont (BEL) Building info
• Campus map (interactive Flash map)

3) Intra-College onboarding for faculty, staff, and UTemps (not student employees)

Meadows Center and National Deaf Center employees:

Follow local procedures.
IPSI and CCCSE employees:

1) Information Technology

Note: IT support for IPSI and CCCSE is provided by Technology Resources (TRECS). For assistance, submit a TRECS Incident Form via ServiceNow.

**Actions for New Employee:**

- Register for Duo
- Claim Outlook mailbox

**Action for Manager:**

As far in advance of the employee's first day as possible, submit a TRECS Customer Onboarding request via the ServiceNow online system.

2) Building access

**Actions for Manager:**

Request keys and EPSS (formerly BACS) access for new employee as needed.

1) Sanchez (SZB) Building Key requests

2) Electronic Physical Security System (EPSS) for after-hours access (formerly BACS) to SZB

**Resources:**

- Sanchez (SZB) Building directions and map
- Sanchez (SZB) Building info
- Bellmont (BEL) Building info
- Campus map (interactive Flash map)

3) Office of Communications

**Actions for Manager:**

Email both coecom munications@austin.utexas.edu and coewebteam@austin.utexas.edu the information listed below about the new employee. They will set up a head shot appointment and add the new employee to the web site.

- Type of employee: Staff, tenured/tenure-track (T/TT) faculty, or non-tenure track (NTT) faculty
- Name
- EID
- Title
- Department
- Start date
- Office location (room number)
- Email address (personal and UT address, if available)

All other COE units:

The direct supervisor (or appropriate delegate) should complete the Employee Onboarding Form following the guidance below.

1) Before beginning the form, gather all needed information.

**Employee information**

- First and last name
- EID
- Employee type (T/TT or NTT faculty, staff, UTemp)
- Percent time appointment (for faculty, determines eligibility in Technology Life Cycle program)
- Primary department/office
- Secondary department/office, if applicable
- Job title
- Start date
- UT email address, if available. Ask employee if they have been notified by ITS of new UT email address.
- Personal email address, if UT email address is not available
- Office assignment (building and room number)

**Technology and software needs**

- If using existing device, UT inventory tag and item location
If a new device is needed, description and specs.
Specific software needs beyond the standard suite.
- Standard suite is Office365 applications, common web browsers, VPN client, anti-virus software, and Acrobat Reader.
- Standard suite does not include Acrobat Pro, FileMaker Pro, Windows emulation software, or mainframe client – these must be specifically requested if needed.
- If using existing device, location and phone number.

Office Telephone
- If using existing device, location and phone number.
- If a new device is needed, type:
  - Any basic, any business, or other. See list of options.

Outlook mailbox and calendar designations, if any
Names and type of access needed (e.g., COE_ITO calendar, KHE Staff All mailbox).

Electronic Door Locks, if any
If employee will need to unlock/lock any ITO-managed programmable electronic door locks for individual rooms, gyms, or labs, list room numbers. (This does not include building entry locks, which are managed by Facilities.)

Transfer of Sponsored Research Agreements
Does the faculty member have any sponsored research agreements (e.g., grants, data use agreements, confidentiality agreements, etc.) that will need to be transferred to UT Austin in anticipation of their start date?

2) Complete and submit Employee Onboarding Form (EID login and authentication required)
3) The form will route to multiple college offices to initiate processes within each.

Once submitted, the form will route to the following college offices:

College of Education Research Administration (COERA)
COERA will be notified if a faculty member has any sponsored research agreements (grants, data use agreements, confidentiality agreements, etc) that will need to be transferred to UT Austin in anticipation of their start date. COERA staff will reach out to the faculty member directly with additional follow-up questions depending on the type of agreement, sponsor, project period, documentation required, etc.

Facilities Services
Facilities Services will be notified of new hire to:
- Add employee to education_szb@utlists.utexas.edu UT List (SZB building occupants)
- Authorize (faculty and staff) to access COE Facilities resource (wiki) pages
- Authorize employee for Sanchez and/or Belmont EPSS (Electronic Physical Security System; formerly BACS) access.
  (Note that an employee must first have a UT ID card with a proximity sensor before they can be authorized in the EPSS system.)

Note: The form cannot be used to make building key requests. Keys should be requested outside of this process, here: Sanchez (SZB) Building Key requests

Information Technology Office
A help request will be submitted to track computing device setup for the employee.

ITO will also:
- If electronic access to ITO-managed electric door(s) is needed, a separate help request will be submitted on your behalf to the attention of James Cutrone.
- Submit a request on the employee's behalf to change Caller ID and add new or replace UT Voicemail box, as required
- Add the employee to the CoE UT Lists below, as appropriate:
  - education_all (faculty and staff)
  - education_faculty_all
  - education_faculty (t/tt)
  - education_faculty_ntt
  - education_informational
  - education_staff

Office of Communications (OOC)
Both the web and communications teams will be notified. OOC will contact the employee to set up an employee photo and bio, and add them to the college newsletter listserv.
Office of Instructional Innovation (OI2)

Faculty only: OI2 will contact the new faculty member regarding information about the services their office can provide.

Questions or Issues After Onboarding Form is Submitted

A help request ticket will be automatically created after an onboarding form is submitted. ITO staff will contact the form submitter and/or the employee via the ticket with clarifying questions should the need arise. The form submitter and/or employee can also reply via the ticket email to provide additional information or ask follow-up questions.

Post-submission follow-up questions for COERA, Facilities Services, OOC, or OI2 should be addressed to those offices directly. Contact for Dean's Office units is available here.