

FM ONBOARDING CHECKLIST FOR PA & CIVIL SERVICE EMPLOYEES

	Time	Responsible	Activity	Description	✓
Pre-employment	3 days/1st day	Manager	Send employee the I 9 form link no more than 3 days prior to start	Online I-9 Employee Reference Guide http://www1.umn.edu/ohr/prod/groups/ohr/@pub/@ohr/documents/asset/ohr_asset_115735.pdf I-9 form link http://www.i9express.com/ Click arrow next to Go to newI9 online.com link lower left corner and enter employer code 13636 and follow the steps.	<input type="checkbox"/>
			Verify PAN form was completed by Payroll on first day of hire	Verify that PAN Form was completed for Payroll by HR and COMPASS approval dollar amount is included, based upon position. For internal transfers, "receiving" supervisor/ department will complete PAN	<input type="checkbox"/>
			Prepare a New Hire Packet and give on first day	Executive Admin: Include U Services/FM/CPPM phone list, COMPASS pay codes, Campus map, District organizational chart, Payroll calendar, and ALL staff documents used within a District or Department for new employees and trade personnel.	<input type="checkbox"/>
			Email Larry Thompson to schedule safety training	Larry Thompson thomp419@umn.edu to schedule safety training for employees first day and enter on Google calendar.	<input type="checkbox"/>
			Call or email to make appointment with Payroll on 1st day of employment	Jan Krippner, 612-625-0728, or kripp001@umn.edu or Kerry Dahl, 612-625-9517, dahlk@umn.edu , to make an appointment in Donhowe Building.	<input type="checkbox"/>
1st day of employment	1st day	Manager/ Employee	Complete Payroll and Auto Deposit form with Payroll	FM Payroll (Donhowe) - Complete Payroll/Auto Deposit with Jan Krippner ext. 5-0728 kripp001@umn.edu or Kerry Dahl (612) 625-9517 Donhowe Building . Please call Jan or Kerry to make an appointment. Bring driver's license or state ID and Social Security card or valid passport	<input type="checkbox"/>
			Sign acknowledgement form	U of M Employee Handbook http://facm.umn.edu/sites/facm.umn.edu/files/fm-new-employee-info.pdf Return acknowledgement form (Page 39) to HR	<input type="checkbox"/>
			Provide unit documents	Organizational chart, campus maps, building lists, phone lists, etc.	<input type="checkbox"/>
			Introduction and Tour	Meet appropriate staff with Supervisor or Manager and identify office, break room and restroom areas	<input type="checkbox"/>
	1st week	Manager	Order Business Cards	http://www.printing.umn.edu/ Under the Make it official, click Order official U of M Stationery & business cards, then order Official U of M Stationery, then order official Printed U of M stationery.	
			Get UCard	Visit to U Card office – Coffman Memorial – ext. 612-626-9900. Wait until 2 day for UCard Office to have information	
			Order/change cubicle name plates	signshop@umn.edu . Add to mail area.	<input type="checkbox"/>
			Reset desk phone voicemail password	Dial 1-HELP or ext. 1-4357 or help@umn.edu	<input type="checkbox"/>
			Add to	Google Calendar - meetings, shared calendars, lists, energy alarms, contact groups, message distribution list	<input type="checkbox"/>
			Enter and Upload	Emergency Contact Form (update in FM Contacts) and Professional License in ULearn	<input type="checkbox"/>

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			Register w/Codes Dept. (if applicable to position)	Peggy Kristyniak krist006@umn.edu	
Access	1st Week	Manager	Satellite Stores Access/Schlage Readers	Email Renee Tyler (tyler098@umn.edu)	<input type="checkbox"/>
			Access to All AHC Facilities Form (if applicable to position)	http://hub.ahc.umn.edu/facilities/research-building-management-services/building-access	
			RBMS (if applicable to position)	Admin Manager/Admin Assist to complete the Supervisor Approval Form for RBMS Access http://hub.ahc.umn.edu/facilities/research-building-management-services/building-access	
			Key Trak Access Finger Scan check with districts	Email Brian McDonald at mcdon094@umn.edu or call 5-1863 for appointment	<input type="checkbox"/>
			Submit M Drive Access Request	(U of M Floor Plan Access) John Cook cookx075@umn.edu	
			Building keys	If you are a DFR, please request keys via Locksmith Services at http://facm.umn.edu/central-services/locksmith click online Key Request.	
			Building Card Access	Access can be requested by your DFR via MyU Manage Building tab: https://umnprd.service-now.com	<input type="checkbox"/>
			Fleet Services	Obtain valid driver's license; enter into Fleet Services DRA database as authorized driver.	<input type="checkbox"/>
			ROHP (if applicable to position)	To register an employee email uohs@umn.edu . To schedule related Occupational Medicine Appointments with Health Partners 952-883-6999 (Mechs/Trades).	<input type="checkbox"/>
			RAR (if applicable to position)	Complete form and training will be emailed to employee email raraces@umn.edu (need link)	<input type="checkbox"/>
			OIT Access	If applicable, complete form and email to jpez@umn.edu	<input type="checkbox"/>
			DUO (admin and Director)	The University uses a two-factor authentication system for users who need access to its enterprise-level applications (e.g., CS PeopleSoft, EFS PeopleSoft, EDMS, and the Data Warehouse) and for the underlying servers and databases. https://it.umn.edu/self-help-guide/duo-setup-use-two-factor-authentication	<input type="checkbox"/>
			U Construction MS Project Account (if applicable to position)	Request access from Admin via http://www.uservices.umn.edu/pmo/arf.html Contact for MS Project Accts – Mustafa Artan maartan@umn.edu	<input type="checkbox"/>

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Training	Within 60 days	Manager/ Employee	COMPASS training	Facilities Management Website http://www.facm.umn.edu/employees/training - Click on COMPASS and UMConnect training or COMPASS Quick Start PowerPoint – The following three trainings will provide helpful training for your initial COMPASS use – 1) U001 Navigation in COMPASS 2) U701CO Labor Entry 3) U213 Purchase Requisition	<input type="checkbox"/>
			Asbestos Training (if applicable to position)	Register New Employee for Asbestos Training (60 Days to complete training, offered 1st Wed each month in Food Ops)	<input type="checkbox"/>
			Financial Management Courses (if applicable to position)	Register via (Ex. Accounting, Chart of Accounts, PCard Processing) http://www1.umn.edu/ohr/training/trainingservices/financial/courses/index.html#taexp	<input type="checkbox"/>
			Access Request Form (if applicable to position)	Complete Access Request Form (ARF) upon completion of financial training http://finsys.umn.edu/efs/arf.html	<input type="checkbox"/>
			New Employee Orientation	New Employee Orientation Online Registration http://www1.umn.edu/ohr/training/index.html click on New Employee Orientation, then click sign up to attend. (Register on 1 st Day of Employment)	<input type="checkbox"/>
Information Technology	1st Week	Manager/ Employee	Space Management Viewing Rights	Submit Space Management viewing rights request – Questions regarding space management contact Sherri Boone boone024@umn.edu or OIT Help at 612-301-HELP or (ext. 1-4357 internally) http://www.spacemanagement.umn.edu/resources-page/u-space/request-u-space-access.html Fax U-Space Data form to OIT Security at 612-625-0303	<input type="checkbox"/>
			IS Access Request	Submit IS Access Request via Link https://umnprd.service-now.com/navpage.do (Request Drives, special software/COMPASS access - mirror other employees, assign warehouse)	<input type="checkbox"/>
			FM Contacts (for Admin Managers)	Request FM Contacts (for Admin Managers) - Call 1-HELP for download, must have DUO	<input type="checkbox"/>
			Kronos Access	Request Kronos access (for supervisors)- Access issues, contact Laura Whitesell lrhicks@umn.edu	<input type="checkbox"/>
Supplies	Within 90 days	Manager/ Employee	PCard (if applicable to position)	If needed, complete PCard application http://finsys.umn.edu/pcard/	<input type="checkbox"/>
			Supply Ordering (if applicable to position)	Umarket Supply Ordering - Contact Umarket for set up, call 4-4878 or email umarket@umn.edu	<input type="checkbox"/>
			Parking Charge Card	Issue to employee, if needed.	<input type="checkbox"/>
			Cell phone and Accessories (if applicable to position)	Issue Cell phone and Accessories (Set up Gmail, reset passwords, update AT&T software, add phone to fire pager text)	<input type="checkbox"/>
			Office/Desk Supplies	Order office/desk Supplies	<input type="checkbox"/>

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Helpful Links & Contacts		Employee	MyU – http://myu.umn.edu is the employees personal U of M login account that provides individual HR and Personnel information (position, salary, W-4, benefit, pay statements, wellness, etc.)	<input type="checkbox"/>
			Dial 8 for an outside line followed by the 7 (local) or 10 (long distance) digit number	<input type="checkbox"/>
			IT Computer/Phone Assistance – submit an online request to help@umn.edu or dial 1-HELP from desk phone	<input type="checkbox"/>
			Monthly Parking Contract – Contact Parking and Transportation at http://pts.umn.edu/park/ ext. 6-7275 or visit 300 Transportation Services Bldg. on Washington Avenue	<input type="checkbox"/>
			Astra Schedule for booking class/conference/meeting rooms https://z.umn.edu/astra	<input type="checkbox"/>
			Report a building Custodial or Maintenance repair, dial ext. 4-2900 and report it to the Call Center.	<input type="checkbox"/>
			Facilities Management Website http://www.facm.umn.edu All about Facilities Management	<input type="checkbox"/>
			U of M Dining/Catering Services - 4-7173 or http://www.dining.umn.edu/Catering/	<input type="checkbox"/>
			University of Minnesota Twin Cities website & People Search (Employee look-up) http://twin-cities.umn.edu/	<input type="checkbox"/>
Misc				