

## FACILITIES MANAGEMENT ONBOARDING CHECKLIST

	Time-line	Responsible	Activity	Description	✓
Pre-employment	3 days	Manager	Send employee the I 9 form link	Online I-9 Employee Reference Guide <a href="http://www1.umn.edu/ohr/prod/groups/ohr/@pub/@ohr/documents/asset/ohr_asset_115735.pdf">http://www1.umn.edu/ohr/prod/groups/ohr/@pub/@ohr/documents/asset/ohr_asset_115735.pdf</a> I-9 form link <a href="http://www.i9express.com/">http://www.i9express.com/</a> 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	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	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 Jordan Romine to schedule safety training (For Trades Personnel)	Jordan Romine ( <a href="mailto:romin020@umn.edu">romin020@umn.edu</a> ) to schedule safety training for employees first day and enter on Google calendar.	<input type="checkbox"/>
		Employee	Complete the first part of I 9 (Employee Section) online	Online I-9 Employee Reference Guide <a href="http://www1.umn.edu/ohr/prod/groups/ohr/@pub/@ohr/documents/asset/ohr_asset_115735.pdf">http://www1.umn.edu/ohr/prod/groups/ohr/@pub/@ohr/documents/asset/ohr_asset_115735.pdf</a> I-9 form link <a href="http://www.i9express.com/">http://www.i9express.com/</a> Click arrow next to Go to new I9 online.com link lower left corner and enter employer code 13636 and follow the steps.	<input type="checkbox"/>
			Bring Documentation	Ensure new hire brings I-9 documentation within first 3 days of employment (page 9) <a href="https://www.uscis.gov/sites/default/files/files/form/i-9.pdf">https://www.uscis.gov/sites/default/files/files/form/i-9.pdf</a>	<input type="checkbox"/>
			Call to make appointment with Payroll on 1st day of employment	Jan Krippner, 612-625-0728, or <a href="mailto:kripp001@umn.edu">kripp001@umn.edu</a> or Kerry Dahl, 612-625-9517, <a href="mailto:dahlk@umn.edu">dahlk@umn.edu</a> , to make an appointment in Donhowe Building.	<input type="checkbox"/>
1st day of employment	1 Day	Manager/ Employee	Complete Payroll and Auto Deposit form with Payroll	FM Payroll (DonHowe) - Complete Payroll/Auto Deposit with Jan Krippner ext. 5-0728 <a href="mailto:kripp001@umn.edu">kripp001@umn.edu</a> or Kerry Dahl (612) 625-9517 Donhowe Building . Please call Jan or Kerry to make an appointment. <b>Bring drivers license or state ID and Social Security card or valid passport</b>	<input type="checkbox"/>
			Review and sign	FM Timekeeping System Policy	<input type="checkbox"/>
				FM Lockout/Tagout Program - to be reviewed with Supervisor/Manager	<input type="checkbox"/>
				"Critical Employee Designation" letter	<input type="checkbox"/>
			Sign acknowledgement form	U of M Employee Handbook <a href="http://facm.umn.edu/sites/facm.umn.edu/files/fm-new-employee-info.pdf">http://facm.umn.edu/sites/facm.umn.edu/files/fm-new-employee-info.pdf</a> Return acknowledgement form 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"/>
				District building tour	<input type="checkbox"/>
	1 week	Manager	Order Business Cards	<a href="http://www.printing.umn.edu/">http://www.printing.umn.edu/</a> Under the Make it official, click Order official U of M Stationery & business cards, then	<input type="checkbox"/>

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Access				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	<input type="checkbox"/>
			Order/change cubicle name plates	<a href="mailto:signshop@umn.edu">signshop@umn.edu</a> . Add to mail area.	<input type="checkbox"/>
			Reset desk phone voicemail password	Dial 1-HELP or ext. 1-4357 or <a href="mailto:help@umn.edu">help@umn.edu</a>	<input type="checkbox"/>
			Add to	Google Calendar - meetings, shared calendars, lists, energy alarms, contact groups, message distribution list	<input type="checkbox"/>
			Provide Phone number	Sick and Late Line	<input type="checkbox"/>
			Enter and Upload	Emergency Contact Form (update in FM Contacts) and Professional License in ULearn	<input type="checkbox"/>
			Register w/Codes Dept.	Suannah Owens ext. 4-7794 <a href="mailto:owens023@umn.edu">owens023@umn.edu</a> via Peggy Kristyniak <a href="mailto:krist006@umn.edu">krist006@umn.edu</a>	<input type="checkbox"/>
	Manager		Satellite Stores Access/Schlage Readers	Email Renee Tyler ( <a href="mailto:tyler098@umn.edu">tyler098@umn.edu</a> )	<input type="checkbox"/>
			Access to All AHC Facilities Form	<a href="http://hub.ahc.umn.edu/facilities/research-building-management-services/building-access">http://hub.ahc.umn.edu/facilities/research-building-management-services/building-access</a>	
			RBMS	Admin Manager/Admin Assist to complete the Supervisor Approval Form for RBMS Access <a href="http://hub.ahc.umn.edu/facilities/research-building-management-services/building-access">http://hub.ahc.umn.edu/facilities/research-building-management-services/building-access</a>	
			Key Trak Access Finger Scan	Email Brian McDonald at <a href="mailto:mcdon094@umn.edu">mcdon094@umn.edu</a> or call 5-1863 for appointment	<input type="checkbox"/>
			Submit M Drive Access Request	(U of M Floor Plan Access) John Cook <a href="mailto:cookx075@umn.edu">cookx075@umn.edu</a>	
			Building keys	If you are a DFR, please request keys via Locksmith Services at <a href="http://facm.umn.edu/central-services/locksmith">http://facm.umn.edu/central-services/locksmith</a> click online Key Request.	
			Keybox Pegs	Each employee should have pegs for checking out keybox keys. Pegs should identify the employee so keys can be tracked.	<input type="checkbox"/>
			Building Card Access	Access can be requested by your DFR via MyU Manage Building tab: <a href="https://umnprd.service-now.com">https://umnprd.service-now.com</a>	<input type="checkbox"/>
			Fleet Services	Obtain valid driver's license; enter into Fleet Services DRA database as authorized driver.	<input type="checkbox"/>
			ROHP	To register an employee email <a href="mailto:uohs@umn.edu">uohs@umn.edu</a> . To schedule related Occupational Medicine Appointments with Health Partners 952-883-6999 (Mechs/Trades).	<input type="checkbox"/>
			RAR	Complete form and training will be emailed to employee email <a href="mailto:raracces@umn.edu">raracces@umn.edu</a> (need link)	<input type="checkbox"/>
			OIT Access	If applicable, complete form and email to <a href="mailto:jpz@umn.edu">jpz@umn.edu</a>	<input type="checkbox"/>
			DUO	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. <a href="https://it.umn.edu/self-help-guide/duo-setup-use-two-factor-authentication">https://it.umn.edu/self-help-guide/duo-setup-use-two-factor-authentication</a>	<input type="checkbox"/>
			U Construction MS Project Account	Request access from Suannah Owens ext. 4-7794 <a href="mailto:owens023@umn.edu">owens023@umn.edu</a> via <a href="http://www.uservices.umn.edu/pmo/arf.html">http://www.uservices.umn.edu/pmo/arf.html</a> Contact for MS Project Accts – Mustafa Artan <a href="mailto:maartan@umn.edu">maartan@umn.edu</a>	<input type="checkbox"/>

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Training		Manager/ Employee	COMPASS training	Facilities Management Website <a href="http://www.facm.umn.edu/employees/training">http://www.facm.umn.edu/employees/training</a> - 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"/>
	Complete within 60 days of hire		Asbestos Training	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	Register via (Ex. Accounting, Chart of Accounts, PCard Processing) <a href="http://www1.umn.edu/ohr/training/trainingservices/financial/courses/index.html#taexp">http://www1.umn.edu/ohr/training/trainingservices/financial/courses/index.html#taexp</a>	<input type="checkbox"/>
			Access Request Form	Complete Access Request Form (ARF) upon completion of financial training <a href="http://finsys.umn.edu/efs/arf.html">http://finsys.umn.edu/efs/arf.html</a>	<input type="checkbox"/>
			Speak Up Training	Speak Up Training via ULearn <a href="http://www1.umn.edu/ohr/training/lms/">http://www1.umn.edu/ohr/training/lms/</a> click on Sign in to ULearn then use your X500 ID and Password to sign in. After sign-in type Speak Up in the Search Box (upper right corner) then locate the Speak Up Twin Cities, prior to launching the training make sure pop-up blocker is disabled, use this link to access disable instruction <a href="http://it.umn.edu/how-disable-pop-blockers-or-add-trusted">http://it.umn.edu/how-disable-pop-blockers-or-add-trusted</a>	<input type="checkbox"/>
			New Employee Orientation	<b>University of Minnesota new Employee Orientation</b> Online Registration: (1st day of employment) <a href="https://humanresources.umn.edu/starting-u/neo#anchor-2">https://humanresources.umn.edu/starting-u/neo#anchor-2</a>  For <b>Userservices New Employee Orientation</b> , Supervisors need to email Jordan Hollingsworth at <a href="mailto:hollj232@umn.edu">hollj232@umn.edu</a>	<input type="checkbox"/>
Information Technology		Manager/ Employee	Space Management Viewing Rights	Submit Space Management viewing rights request – Questions regarding space management contact Sherri Boone <a href="mailto:boone024@umn.edu">boone024@umn.edu</a> or OIT Help at 612-301-HELP or (ext. 1-4357 internally) <a href="http://www.spacemanagement.umn.edu/resources-page/u-space/request-u-space-access.html">http://www.spacemanagement.umn.edu/resources-page/u-space/request-u-space-access.html</a> Fax U-Space Data form to OIT Security at 612-625-0303	<input type="checkbox"/>
			IS Access Request	Submit IS Access Request via Link <a href="https://umnprd.service-now.com/navpage.do">https://umnprd.service-now.com/navpage.do</a> (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 <a href="mailto:lrhicks@umn.edu">lrhicks@umn.edu</a>	<input type="checkbox"/>
Supplies		Manager/ Employee	PCard	If needed, complete PCard application <a href="http://finsys.umn.edu/pcard/">http://finsys.umn.edu/pcard/</a>	<input type="checkbox"/>
			Supply Ordering	Umarket Supply Ordering - Contact Umarket for set up, call 4-4878 or email <a href="mailto:umarket@umn.edu">umarket@umn.edu</a>	<input type="checkbox"/>
			Parking Charge Card	Issue to employee, if needed.	<input type="checkbox"/>
			Cell phone and Accessories	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 – Executive Admin	<input type="checkbox"/>

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			Deskside Trash and Recycling saddles	<a href="http://z.umn.edu/saddleorderform">z.umn.edu/saddleorderform</a>	
			Locker Assignment	Locker Assignment	<input type="checkbox"/>
			Fastenal Vending	Enter new employee in software system, assign dispense/locker rules. Fastenal Account Rep., Aaron Barriger <a href="mailto:651-329-7767/abarrige@fastenal.com">651-329-7767/abarrige@fastenal.com</a> <a href="http://fastsolutions.mroadmin.com/APEX-Login/login.jsp">http://fastsolutions.mroadmin.com/APEX-Login/login.jsp</a>	<input type="checkbox"/>
Helpful Links & Contacts		Employee	MyU – <a href="http://myu.umn.edu">http://myu.umn.edu</a> 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"/>
			<b>Dial 8 for an outside line</b> followed by the 7 (local) or 10 (long distance) digit number		<input type="checkbox"/>
			IT Computer/Phone Assistance – submit an online request to <a href="mailto:help@umn.edu">help@umn.edu</a> or dial <b>1-HELP</b> from desk phone		<input type="checkbox"/>
			Monthly Parking Contract – Contact Parking and Transportation at <a href="http://pts.umn.edu/park/">http://pts.umn.edu/park/</a> ext. 6-7275 or visit 300 Transportation Services Bldg. on Washington Avenue		<input type="checkbox"/>
			Astra Schedule for booking class/conference/meeting rooms <a href="https://z.umn.edu/astra">https://z.umn.edu/astra</a>		<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 <a href="http://www.facm.umn.edu">http://www.facm.umn.edu</a> All about Facilities Management		<input type="checkbox"/>
			U of M Dining/Catering Services - 4-7173 or <a href="http://www.dining.umn.edu/Catering/">http://www.dining.umn.edu/Catering/</a>		<input type="checkbox"/>
			University of Minnesota Twin Cities website & People Search (Employee look-up) <a href="http://twin-cities.umn.edu/">http://twin-cities.umn.edu/</a>		<input type="checkbox"/>
Misc					