

Student Affairs Onboarding Checklist for Approvals & Forms

- **PAF** – Request a PAF to be processed by Linda Telfer once the employee has accepted the position and a start date and salary have been established.
- **New Employee Orientation form** – *All employees must attend New Employee Orientation*
 - <http://ferris.edu/HTMLS/administration/adminandfinance/human/Forms/neo.htm>
 - This allows you to determine when the next available new employee orientation is taking place and provides help to filling this out. The date selected is based on the start date of the employee
- **Banner** – Once HR has created a user ID, you can begin working on access for the employee. If the employee will have access to enter Direct Pays, Requisitions or Change Order's, you will need to set up the approval flow for them. Once the banner request for access has been made, contact Deanna and she will put in a request to Susan Roberts to update the approval flow for that person. If they are getting Query Only access, no flows are necessary.
 - The below forms are necessary to obtain access in the system. All of these forms can be found in MyFSU, Forms, Data Security Forms:
 - **Banner/WebFocus/Xtender Request Form**
 - **Confidential Data Security Agreement**
 - **Network File Share-Access Rights** – This gives your employee access to your departmental J: Drive.
 - The forms need to be completed by the new employee. These can be sent to the employee ahead of time and sent back with a signature or electronic signature.
 - Banner training will be set up with the Banner Request form is submitted. They must complete training before any access in Banner will be given.
- **Concur/Corporate Card** – You will need to determine if the employee needs a corporate card.
 - If they do, fill out the **"New Card Application"** located in MyFSU, Forms, Disbursements Office, Corporate Card.
 - The employee will have to go through Concur training before they will receive a card.
 - Whether or not they get a corporate card, fill out the approval flow form so that they are correctly set up in Concur for any type of reimbursement that could be needed in the future. This is located in MyFSU, Forms, Disbursements Office, Concur, **"Approval Flow"**. Please ask Deanna if you are unsure of what the approval flow should be.
- **Telephone** –
 - The following link provides instructions on how to set up your voicemail on the current landline phone:
 - <https://ferris.edu/it/tts/tts-phoneandcable-cellphonesforemployees.htm>
 - If the employee will be receiving a University Cell phone
 - Visit: <https://ferris.edu/it/tts/tts-phoneandcable-cellphonesforemployees.htm>
 - Click on the **MCD Approval Form**
 - If the employee is handling the financial aspects of the phone bills and needs to see the detail associated with the monthly charges booked to your FOAP from Telecom:
 - Visit <https://www.ferris.edu/staffservices/telecomm/>
 - Click on Access Request and fill out the **Telecommunications Website Access Request Form**.
- **Time Off Manager** –
 - In MyFSU, Forms, Data Security Forms – *Time Off Manager – Individual Access*
 - Send the completed form to TAC@ferris.edu.
- **FGRODTA Budget Reports** – If the person hired needs to have detail of monthly spending transactions, request a ticket to TAC and also let Deanna know if your request.
- **Physical Technology** – You will need to determine if the employee will need any physical technology such as computers, monitors, laptops, tablets, etc. If so, put in a request through the IT technology purchasing portal.
- **GCN Trainings** – Online training courses are available and may be required depending on the position being filled. Contact Mike McKay at x2147 to determine if any of these are needed.