

Onboarding preparation – ETO form

Most items for new hires are requisitioned through the Employee Technical Onboarding (ETO) form. HR will send this form to the hiring manager for completion. The most recent ETO form instructions are on [Udocs](#) and should be referenced there. The completed form items should be submitted per the instructions to HR, Operations, and any assignees at minimum 6 business days in advance of the start date.

Items not submitted in the designated time window may not be ready for your new hire's first day.

If there are changes after the ETO has been submitted, or if an item is missing after setup, contact the corresponding department directly.

IT, technology hardware and setup	support@uws.edu
CTL, learning management systems	ctladmin@uws.edu
Operations, physical campus requests	facilities@uws.edu

Below are the instructions for properly using your department's System Matrix in conjunction with the Technical Onboarding Form in order to get your new hire setup with all components they will need to perform their job on day one.

[Section two](#) of this document outlines responsibilities, for reference.

In [section three](#) of this document we have provided definitions for fields in the Technical Onboarding Form.

Manager Instructions for Filling out Technical Onboarding Form

1. Open your department's System Matrix folder located here:
 - \\uwsnet.net\Files\System_Matrix
2. Review the access to systems for the position you have hired.
 - The New hire will receive a Baseline Technical Setup based on the position of the new hire in relevance to your Department's System Matrix.
 - The System Matrix is used by Technical Services as the Baseline for user setup for every new hire.
 - The new employee will not be setup with any system that is not specified on the System Matrix under the new hires position, unless indicated, otherwise, on the Technical Onboarding Form.
3. Open the Technical Onboarding Form Sent by HR.
4. Fill out the form with all requests that can't be fulfilled by the Employee Baseline setup indicated on the department's system matrix.
5. Use the form to provide a detailed request for everything a new hire will need in order to perform their job on day one. This includes all the areas outlined on the Technical Setup Request Form. The form is broken up into Five Sections:
 - [*Human Resources*](#) – HR to automatically initiate for non-student hires. HR is to fill this section out and then email the form to the hiring manager to complete the three remaining sections.
 - [*Hiring Department Setup*](#) – hiring manager to assign directly within own department. Hiring manager is to fill out this section and assign User Admins to setup user access to applications that are controlled within the hiring department.
 - [*Technical Services Request*](#) - HR to send to IT and CTL, CCing hiring manager. Hiring manager to fill out this section for everything the hiring department cannot setup within their own department, but can be fulfilled by Technical Services.
For Faculty Members ([see definition](#)), please complete the New Faculty LMS Access Request



subsection.

- Operations Request - Hiring Manager to send to facilities@uws.edu
Hiring manager to work with Operations to identify new office/desk locations ahead of time, if needed.
Hiring manager is to fill this section out when there is a furniture, space, or building access request.
Hiring manager is to send request to Operations.
- Miscellaneous Request – Hiring manager to send directly to assignees indicated
Hiring manager to fill out this section when there is a request that can't be handled in one of the four sections above.
Hiring manager is to send request to assignee directly.

6. Once you have filled out the Technical Setup Request form, please send the Excel document back to HR as well as to Operations and any miscellaneous assignees.

If you need help on the form, please see the Form Field Definitions below. If you still have questions, please reach out to the corresponding department.

Division of Responsibilities

Human Resources

- Initiate ETO form for incoming non-student hires. Complete top section and send to hiring manager
- Forward completed form to IT and CTL, CCing hiring manager
- Obtain ID badge for new hire. Give badge to new hire
- Give computer/email login information to new hire
- Notify IT, CTL, Operations, and hiring manager of any relevant changes to start date

Hiring Manager

- Complete ETO form
- Send completed form to HR
- Send completed form to Operations, if needed
- Contact any assignees
- Reach out directly to departments if changes are needed after ETO submission, except to start date
- Notify assignees of any relevant start date changes
- Before start date, use ETO as a checklist to confirm item completion
- Follow up directly with departments and assignees to complete outstanding items

IT

- Generate welcome letter for HR
- Complete any requests on the ETO form
- Follow up with hiring manager as needed

Operations

- Generate ID badge for HR
- Complete any requests on the ETO form
- Follow up with hiring manager as needed

Assignees

- Complete any requests from hiring manager
- Follow up with hiring manager as needed

Form Field Definitions

Application(s) or Other Request for Technical Services: Applications are desktop or web-based programs that provide an employee the ability to do their job. i.e. Adobe Pro, Microsoft Visio, Survey Monkey, Notepad++. This section is designated for additional request that can't be fulfilled under the Baseline employee setup found in your department's system matrix, the Hiring Department Setup section, the Facilities Request section or the Miscellaneous Section.

Application(s) or Request that will be setup by an additional UWS Department: This section is built for request that are fulfilled by third party UWS departments, that handle user setup for, but not limited to, an application or a service request. Please fill this section out for tracking purposes and then request setup up with Assignee.

Application(s) or Request that will be setup by hiring department: List all the application, programs or request that are to be setup internally for the new hire. This would include: Recurring department meetings, applications that are administered within the department and any department setup request that isn't identified on the form.

Are Keys Needed: Indicates the need for office and/or building keys for the new hire.

Assignee (First & Last Name): The individual within the hiring department, or the individual in a different UWS department, that has admin rights to setup the new employee as a user under the indicated applications or request.

Cell Phone/iPad: Indicate if the employee will need to be setup with a University Cell phone and/or an iPad in order to perform their job.

Computer Type: Indicate if the employee should be setup with a laptop, desktop or neither.

Course Name: Alphanumerical course code such as DC101. Please use one line for each course and add lines as needed for each course that the faculty member needs access to.

Course Role: Type of access needed for the course. Such as Course Observer or Instructor.

Department: Is the division of UWS the employee resides and reports.

Desk Location: The building, office number, and/or desk location for where the new employee will be seated. If there is not an open location for the new hire, please indicate the issue and provide a possible solution.

Email Distribution List: Manager is to identify which distribution list(s) the new employee will need to be added. Note: the employee will automatically be added to the department's distribution list, All UWS, Employee Admin/Faculty Non-Benefited/Benefited, All Staff/Faculty.

Employment Type: Classification of employment as it relates to UWS's compensation structure.

Employee's First Name: First name that will be used to update or create usernames and application access.

Employee's Last Name: Last name that will be used to update or create usernames and application access.

Facilities Needs: This section is used to request equipment such as keys, a desk, a chair or any other request the facilities department can fulfill. Please fill this section out for tracking purposes and then send an email to facilities@uws.edu requesting setup. If you click on the "Must Fill Out Below & Request with Facilities - Click Here to Request" cell, a template email will appear.

Faculty Member: Describes anyone who teaches in any of the University programs.

Adjunct: may be used to describe a part time or as needed teacher in any of the programs, always applies to Doctor of Chiropractic (DC), mostly applies to online programs

Assistant Professor: a classification of faculty in both DC and online programs that has to do with ranking of the faculty member (the longer you teach, the higher your rank).

Associate Professor: a classification of faculty in both DC and online programs that has to do with ranking of the faculty member (the longer you teach, the higher your rank).

Facilitator: course facilitator is not a teacher and therefore, not faculty. Course facilitators only work for online programs. They are support staff for the online instructors. This position is almost always part time (there are a few exceptions).

Instructor: may be used to describe a part time or as needed teacher in the online programs, often you will adjunct instructor or online adjunct instructor

No – Staff Member: A support and operational employee that does not teach for the University.

Other – Please Explain in Technical Service Section: Use when the Faculty Member can't be categorized into the

pre-defined options in the dropdown menu. Please provide details in the Technical Service Request.

Professor: a classification of faculty in both DC and online programs that has to do with ranking of the faculty member (the longer you teach, the higher your rank).

Teaching Assistant: teaching assistant is not a teacher and therefore, not faculty. Teaching assistants only work for DC program and are always part time. They are support staff for the on-campus faculty.

Folder Access: Manager is to identify which folder(s) the new hire will need access to outside the department's standard shared folder.

Frequently Scan to Email: This field is used to indicate that the employee will be utilizing the scan to email function on a regular basis and needs to be setup with quick scan access on the indicated printer.

Hiring Department Setup: Hiring Manager is to indicate all the application/programs that are to be setup internally for the employee. Tasks are assigned to application admins and are to be completed by the stated SLA time. Manager is to also assign an individual within their department to complete the task for setting up the employee.

Human Resources: This section is used for standard employee information. This section will be filled out by HR prior to sending the form to the Hiring Manager.

Is a Chair Needed: Use this space to request a chair, if there is currently not a chair available for the new hire.

Is a Desk Needed: Use this space to request a desk, if there is currently not a desk available for the new hire to sit.

Is a Key Card Needed: Certain buildings on campus require key card access to enter the building, indicate if the employee needs a key card in order to do their job.

Job Acceptance Date: The date for which the new hire has accepted the offered position.

Job Title: Is the position under the department for which the employee resides.

Managers Name: Individual responsible for controlling and administering the department in which the new hire resides.

Miscellaneous Request: This section is designated for additional request that can't be fulfilled under the Hiring Department Setup section, the Technical Services Request section, the Facilities Request section or the Baseline employee setup found in your department's system matrix. This section is built for request that are fulfilled by third party UWS departments, that handle user setup for, but not limited to, an application or a service request. Please fill this section out for tracking purposes and then please request user setup with the individual (assignee) responsible for fulfilling the request or user setup.

Must Fill Out Below & Request with Assignee: This section must be filled out for tracking purposes and you must also request user setup with the individual (assignee) responsible for fulfilling the request.

Must Fill Out Below & Request with Facilities – Click Here to Request: This section must be filled out for tracking purposes. Additionally, any action or request for Facilities must go through Facilities normal process, by sending an email to facilities@uws.edu. Click "Click Here to Request" and a new email addressed to Facilities will appear.

Name Plate: The name plate will be attached to the employee's desk. Type out exactly how the new employee's name should appear on the name plate. Example: First Name Last Name (Name Suffix), Professional Designation (if applicable), Job Title. Additionally, please send your name plate request to Sara Mathov, VP of Operations & Campus Plan.

Note: Offsite employees don't receive name plates.

Number of Monitors: The number of monitors the new hire will need in order to do their job.

Office/Building Key: Indicates what office and/or building the new employee will need a physical key or a key card.

Onsite Employee: Employee primarily performs their work on campus.

Other Equipment: Additional equipment needed that isn't provided in the Facilities Request.

Other Facilities Request: Any additional request facilities can perform to setup employee.

Phone Type: Indicate what phone type the employee needs in order to do their job. Onsite employees only.

Printer Access: Manager is to identify which printer will need to be added to the employee's computer, please select one printer from the dropdown list.

Shared Calendar: If new hire needs shared Calendar access, manager is to provide details.

Shared Email Box: If new hire needs shared Email access, manager is to provide details.

SLA: Service Level Agreement is the standard amount of time that is expected for each department to complete the employee technical onboarding setup.

Special Needs: Any additional request the new hire needs to do their jobs effectively.



Start Date: The date the employee will official show up and start working at the university.

Student Employee: Employee has a student email address and will be working for the University while seeking a degree.

Technical Services Request: This section of the form is used to request New Hire Technical setup that can be administrated by Technical Services.

Term and Year of Course: The quarter and year of the course. Such as Summer 2021