**New Employee Checklist – Financial Aid**

* Meet with HR – will get A# and user name
* TSFA form – in TSD links on website under forms
* Submit signed security paperwork to IT – will be sent by Dynamic Forms
* Ensure employee has access to Degree Works (Records grants faculty tab, and IT turns on access – should be automatic in Banner set up by form)
* Have IT add new employee to Copier for scanning – send email to Service Desk – Jenn uses template she sent for other staff
* Ensure staff have access to SLATE
* Have new employee added to email lists – once emails are active
	+ BANFA Contacts – in groups – Jenn can do
* Add new employee to Financial Aid group email and on financial aid general email (they will need to call the Service Desk at 3678, while logged in for assistance connecting)
* Set up TG#’s and get tokens
* Get office key cards for employee – form to complete online under Security on website
* Email campus or necessary departments of new employee and extension
* Train new employee
* Discuss timesheets/comp time/late nights/ etc.
* Order Business Cards – if necessary – once have been here at least 6 months
* Order Gold Name tag – once have been here at least 6 months
* Have them make photo ID
* Add access to FAST
* If counselor, add them to SAVE
* Add to NASFAA roster
* After employee gets TG Number, add them to FSA Partner Connect roster
* Set up in EDConnect (if needed by role) and EDExpress, as necessary (must have FSA ID first for EDConnect)
* Request IT set up SQL developer (if necessary)
* Request IT grant them access as a user to the FA ORG and SANDBOX in Dynamic Forms – use the below
	+ Activate Forms
	+ Edit Forms
	+ Form Admin
	+ Form User (the default role, before any are added)
	+ Shared Template Admin
	+ Workflow Action Designer
* Do Conflict of Interest Certification
* Have one-on-one meeting