

# How Do I Set Up a New Employee?

This checklist will help Department IT Coordinators determine which IT Request Forms should be submitted for a new employee.

## Brand New Employees

An employee who has never worked for CSU Fullerton. If you're not sure if they have, you can still follow these steps.

### ☐ 1. Add the employee to the People Directory.

[Follow the instructions to add a person to the People Directory or add a new position for an employee if they already have an existing People Directory record.](#)

## How do I know if an employee is part-time or full-time?

Typically, you will be given the employee's information by an HR analyst in your department/college/division and that person should know whether the employee is part-time or full-time and they should have the position number and bargaining unit information as well.

**Staff:** usually those with a timebase of 1.0 are full-time and all other time bases are considered part-time. Consult with [Payroll Services](#), [Auxiliary Services Human Resources](#), or [Associated Students Human Resources](#) if you are unclear about the employee's timebase.

**Faculty:** it can be complicated to calculate a faculty's timebase, so you may need to contact your department/college/division HR coordinator or [Faculty Affairs & Records](#) to determine if the faculty is full or part time.

### ☐ 2. Request an email account for the employee.

[Follow the instructions for requesting a new email account for an employee.](#)

Student Employee? [Follow the instructions for requesting a new email account for a student employee \(zz account\).](#)

☐ **3. Request a phone and laptop for the employee (as applicable).**

**Request a phone**

No existing phone for the employee? [Follow the instructions for requesting a Zoom Phone.](#)

Have an existing phone to assign to the employee? [Follow the instructions for updating the Display Name for a phone.](#)

**Request a laptop**

[Follow the instructions to request a laptop for the employee \(if eligible\).](#)

## **Employees Transferring from Another Campus Department**

An employee who is currently working in another campus department at CSU Fullerton, but is transferring to a new position in your department.

☐ **1. Coordinate with the previous department's DITC to schedule a move of the employee's existing phone and laptop to their new department/location.**



Not sure who the previous department's DITC is? Ask the employee or contact the IT Help Desk.

Contact the previous department's DITC to discuss whether the employee will be bringing their existing phone and/or laptop to your department. Most of the time, the employee will bring both, but there are circumstances where either the phone or laptop needs to stay with the previous department (e.g., if the employee is using a department-purchased laptop/computer, it will stay with the previous department).

**If a phone and/or laptop will be transferred with the employee**

Give the previous department's DITC the following information:

- Employee's New Office Location
- Employee's New Phone Jack Number
- Employee's New Data Jack Number (for laptop)
- Whether or not the new data jack number is activated (if known)

The previous department's DITC should [follow the instructions to submit an IT Clearance Request](#). Then they should also [follow the instructions to submit a Schedule a Move Request](#).

### **If no phone or laptop will be transferred with the employee**

The previous department's DITC should [follow the instructions to submit an IT Clearance Request](#).

## ☐ **2. Add the employee's new position to the People Directory.**

[Follow the instructions to add a new position for an employee if they already have an existing People Directory record.](#)


## **How do I know if an employee is part-time or full-time?**

Typically, you will be given the employee's information by an HR analyst in your department/college/division and that person should know whether the employee is part-time or full-time and they should have the position number and bargaining unit information as well.


**Staff:** usually those with a timebase of 1.0 are full-time and all other time bases are considered part-time. Consult with [Payroll Services](#), [Auxiliary Services Human Resources](#), or [Associated Students Human Resources](#) if you are unclear about the employee's timebase.

**Faculty:** it can be complicated to calculate a faculty's timebase, so you may need to contact your department/college/division HR coordinator or [Faculty Affairs & Records](#) to determine if the faculty is full or part time.


## ☐ **3. Modify the employee's email account to show their new department.**

 **IMPORTANT:** Do NOT switch the employee to their new department until their first day of work. Changing it ahead of time may cause issues as the previous department's DITC will lose the ability to submit requests for the employee. There may be other department-related access that is also based on their department as well.


If you want to change the employee's department before their first day, be sure to check with the previous department's DITC.

 Remember that the employee's location and phone number information in Outlook is based on the information in the phone database, so you will not be able to update that information in Account Management.

Either the Schedule a Move Request submitted by the previous department's DITC or the phone request that you submit will update the employee's location/phone number.

 View the [Modifying an Email Account guide](#) for more details about how to modify an account.

### **3.1. Log in to Account Management, search for the employee's People Directory entry, select their entry, and then click View next to their new position in your department.**

 Note that you have to look up the employee on the People Directory search because you only see employees in your department on the Email/

Login Accounts search. This process will update the employee so you will be able to find them in the Email/Login Accounts search.



The employee's new position in your department must be [added to the People Directory](#) before you can follow these steps. You don't necessarily need to wait until CMS HR, ASC HR, or ASI HR add the employee's position to the People Directory, but the position must exist.

## Account Management

[PEOPLE DIRECTORY](#) | [EMAIL/LOGIN ACCOUNTS](#) | [PHONE DIRECTORY](#) | [SIGN OUT](#) | [HELP](#)

### People Directory Records

Click "View" next to desired position, in order to proceed with any email requests.

CWID

▼

8

Search

A

New Person

B

CWID	Last Name	MI	First Name
Select	8	TITAN	TUFFY

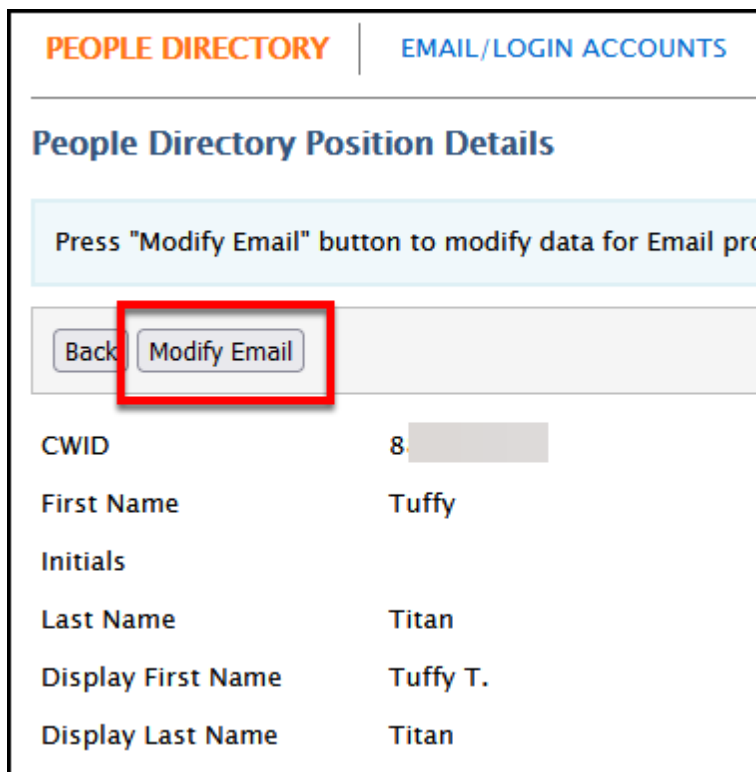
New Position

People Directory Position	Department	Percentage	Source	Status
View	Full-Time Staff	IT-Training	0.00	Active
View	Full-Time Staff	IT-Enterprise Resource Plannin	0.00	Active

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- Enter the employee's Campus-Wide ID (CWID) in the search box and click **Search**.
- Click **Select** next to the employee's People Directory entry.
- Click **View** next to the employee's new position in your department.

### 3.2. Click Modify Email.



**PEOPLE DIRECTORY** | **EMAIL/LOGIN ACCOUNTS**

#### People Directory Position Details

Press "Modify Email" button to modify data for Email pro

[Back](#) [Modify Email](#)

CWID	8
First Name	Tuffy
Initials	
Last Name	Titan
Display First Name	Tuffy T.
Display Last Name	Titan

### 3.3. Modify the Position Type (if applicable) and the Department for the employee. Then click Continue.

**!** Note that the Position Type and Department **MUST** match the information in the People Directory. And the information in the People Directory needs to match with the information in CMS HR (state employees), ASC HR, or ASI HR. Using the incorrect position type or department may impact the employee's access to services, so be sure that everything matches up.

### Modify Computer/Email Account

Update any information as needed and click Continue.  
To request the account **extension** click [Extend Expiration](#). To **disable** the account click [Disable Account](#).

Account Status	<b>Active</b>	
* Resource Type	<input checked="" type="checkbox"/> Email Account <input checked="" type="checkbox"/> Computer Login Account (No Email)	
* Domain	AD	
CWID	8	
* First Name	Tuffy	
Middle Name Initials		
* Last Name	Titan	
* Display First Name	Tuffy T.	
* Display Last Name	Titan	
* Position Type	Full-Time Staff <span>A</span> <input type="checkbox"/> Management	
Personal Title for PDF Phone Directory (e.g. Director, Administrative Assistant)	Training Specialist <span>C</span>	(Optional)
* Username (Maximum 20 characters)	tuffytitan	
* Department	IT - Training <span>B</span>	If department is not listed, email to <a href="mailto:itm@fullerton.edu">itm@fullerton.edu</a>
Account expiration date		
* Location	Fullerton Main Campus <span>D</span>	
MPB Contact		
Last updated by / Updated date	Williams, Nene / Jul 17 2023 10:29AM	

Continue
Cancel
E

- If applicable, use the **Position Type** drop-down menu to change the employee's position type.
- Use the **Department** drop-down menu to select the new department for the employee.
- If applicable, update the **Personal Title for PDF Phone Directory** for the employee.
- If applicable, use the **Location** drop-down menu to change the employee's location.
- Then click **Continue**.

### 3.4. Review the updates and then click Submit.

#### Modify Computer/Email Account

Please verify information and click "Submit" button.

Account Status	Active
Computer Login Account	Yes
Email Account	Yes
Domain	AD
CWID	8
First Name	Tuffy
Middle Name Initials	
Last Name	Titan
Display First Name	Tuffy T.
Display Last Name	Titan
Management	No
Personal Title	Training Specialist
Prefered username	tuffytitan
Job Title	Full-Time Staff
Department	IT - Training
Account expiration date	
Address	800 N. State College Blvd.
City	Fullerton
State	California
Zip	92831-3599
Country	United States of America

### 3.5. You will see a confirmation that your request has been submitted. You will also get email confirmation of your request.

#### Modify Computer/Email Account

Thank you for submitting account request.  
It might take up to 24 hours for the request to get processed.  
Once the account is updated, you will be notified by Email.

- ☐ 4. Request a new phone and/or laptop for the employee if they are not bringing them from their previous department.





Note that you may not be able to submit IT Requests for this employee until you [update their department in Account Management](#) as you will not be able to select the employee's name until they are associated with your department.

### **Request a phone**

No existing phone for the employee? [Follow the instructions for requesting a Zoom Phone.](#)

Have an existing phone to assign to the employee? [Follow the instructions for updating the Display Name for a phone.](#)

### **Request a laptop**

[Follow the instructions to request a laptop for the employee \(if eligible\).](#)

## **Rehiring an Employee to Your Department**

An employee who previously worked in your department is returning to a position in your department.

- ☐ **1. Review the employee's People Directory entry to check whether the correct position exists for them.**

[Follow the instructions to add a person to the People Directory or add a new position for an employee if they already have an existing People Directory record.](#)

### **The employee has the correct position in the People Directory, but it is marked as Separated.**

You will need to extend the expiration of the employee's email account which will also temporarily re-enable their People Directory position. Be sure to extend the expiration long enough for their CMS HR, ASC HR, or ASI HR account to be re-enabled.

[Follow the instructions to extend the expiration of the employee's email account.](#)

### **What if the employee's email account has been deleted?**

You can request a new email account for the employee as long as there is an active People Directory entry for the employee.

You may have to add a new position for the employee in the People Directory or wait until the employee is active in CMS HR, ASC HR, or ASI HR.

## **The employee does NOT have the correct position in the People Directory**

You will need to add the position for the employee in the People Directory.

[Follow the instructions to add a person to the People Directory or add a new position for an employee if they already have an existing People Directory record.](#)

### ☐ **2. Request that the employee's email account be re-enabled.**

If you extended the expiration of the employee's email account as part of [step 1](#), you are done! You already re-enabled the employee's email account as part of the extending the expiration of their account.

If you added the employee's position to the People Directory, [follow the instructions to re-enable the employee's email account.](#)

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### ☐ **3. Request a phone and laptop for the employee (as applicable).**

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### **Request a laptop**

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## **Need More Help?**

Contact the IT Help Desk at [helpdesk@fullerton.edu](mailto:helpdesk@fullerton.edu) or 657-278-7777.