

Information Technology: Tech Support

New Employee

Employee Information

Which of the following items do you need to know about the employee to complete your processes?

- Name
- Street Address
- ID Number
- Position Title
- Manager
- Branch/Department Location
- Start Date
- Sender Email

Do you need any additional information about the employee to begin your processes?

Requests

Laptop and/or Desktop PC:

Laptop – Does the employee need a laptop?

Desktop PC – Does the employee need a desktop PC?

- Are these “yes/no” responses?
- Are there any instances where the employee needs both a laptop and desktop PC?
- Do you need to include a question about monitors?
- Is there any additional information you would like to know for this item?

Printer: **(Noted from Transferring Employee Form)**

Printer – Does the employee need a printer?

Printing Rights – Does the employee need printing rights to certain printers?

- Are these “yes/no” responses?
- Would the manager know which printer the new employee would need access to? Is there a list they can select from?
- Is there any additional information you would like to know for this item?

Phone:

Phone – Does the employee need their own extension?

- Is this a “yes/no” response?
- Is there any additional information you would like to know for this item?

Specialized Software:

Specialized Software – Does the employee need any specialized software? Please specify what software is needed.

- Do you have a list of commonly requested software that could be converted into a check list? For unique software an “other” option could be included with the list. (A list will help to remind managers of what their staff may need.)
- Is there any additional information you would like to know for this item?

Shared Drives:

Add Shared Drives – (Ex. ComRel) Does the employee need any shared drives? Please specify what shared drives are needed.

- Do you have a list of all available shared drives that could be converted into a check list? (A list will help to remind managers of what their staff may need.)
- Is there any additional information you would like to know for this item?

Shared Citrix Folders:

Add Shared Citrix Folders – (Ex. TCSS) Does the employee need any shared Citrix folders? Please specify what Citrix folders are needed.

- Do you have a list of all available shared Citrix folders that could be converted into a check list? (A list will help to remind managers of what their staff may need.)
- Is there any additional information you would like to know for this item?

Vocera:

Vocera – Does the employee need a Vocera or Vocera Account?

- Would this be a “yes/no” response for each (Vocera and account)?
- What information do you need to know to create the Vocera account?
- Is there an instance where the employee needs an account but not the device?
- Is there any additional information you would like to know for this item?

Notes:

- Is the note field used? If so, what type of notes do you typically receive?

Other Information

- Is there any other information you would like to collect from the manager to set up a NEW EMPLOYEE?
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Transferring Employee

Employee Information

Which of the following items do you need to know about the employee to complete your processes?

- Name
- ID Number
- New Position Title (if changed)
- Current Manager
- New Manager (if changing manager)
- Current Branch/Department Location
- New Branch/Department Location (if relocating)
- Start Date
- Sender Email

Do you need any additional information about the employee to begin your processes?

Requests

Laptop and/or Desktop PC:

Laptop – Does the employee have/need a laptop?

Desktop PC – Does the employee have/need a desktop PC?

- Are these “yes/no” responses?
- Are there any instances where the employee needs both a laptop and desktop PC?
- If the TRANSFERRING employee has a laptop and/or desktop PC, do they keep the same equipment?
- Do you need to include a question about monitors?
- Is there any additional information you would like to know for this item?

Printer:

Printer – Does the employee have/need a printer?

Printing rights – Does the employee have/need printing rights to certain printers?

- Are these “yes/no” responses?
- Would the manager know which printer the new employee would need access to? Is there a list they can select from?
- If the employee has a printer, do they keep the same equipment?
- If the employee currently has printing rights, what needs to happen? Do you need additional information for this? Do you need to remove printing rights?
- Is there any additional information you would like to know for this item?

Phone:

Phone – Does the employee have/need a phone extension?

- Is this a “yes/no” response?
- If the employee has a phone, do they keep the same equipment?
- If the employee has an extension, do they keep the same number?
- Is there any additional information you would like to know for this item?

Specialized Software:

Software – Does the employee have/need specialized software installed/uninstalled? (Ex. Contribute)

- Do you have a list of commonly requested software that could be converted into a check list? For unique software an “other” option could be included with the list. (A list will help to remind managers of what their staff may need.)
- What type of responses do you receive when managers request software to be uninstalled?
- Is there any additional information you would like to know for this item?

Shared Drives:

Grant/Remove Permissions from Shared Drives – Does the employee need to have rights granted/removed from Shared Drives? (Ex. ComRel)

- Do you have a list of all available shared drives that could be converted into a check list? (A list will help to remind managers of what their staff may need.)
- What type of responses do you receive when managers request shared drive rights to be removed?
- Is there any additional information you would like to know for this item?

Shared Citrix Folders:

Grant/Remove Permissions from Shared Citrix Folders – Does the employee need to have rights granted/removed from Shared Citrix Folders? (Ex. TCSS)

- Do you have a list of all available shared Citrix folders that could be converted into a check list? (A list will help to remind managers of what their staff may need.)
- What type of responses do you receive when managers request shared Citrix folder rights to be removed?
- Is there any additional information you would like to know for this item?

Vocera:

Vocera – Does the employee have/need a Vocera?

- Is this a “yes/no” response?
- If the employee has a Vocera, do they keep the same equipment?
- Do you also need to know if the employee already has a Vocera account?
- If the employee needs an account, what information do you need to know to create the Vocera account?
- If the employee already has an account, will it be impacted by the transfer? Do you need to update the employee’s information on the account?
- Is there any additional information you would like to know for this item?

Notes:

- Is the note field used? If so, what type of notes do you typically receive?

Other Information

- Is there any other information you would like to collect from the new manager to set up a TRANSFERRING EMPLOYEE?
- Do you typically receive information from the current manager? Or does the information primarily come from the new manager?

Separating\Retiring Employee

Employee Information

Which of the following items do you need to know about the employee to complete your processes?

- Name
- Street Address
- ID Number
- Position Title
- Manager
- Branch/Department Location
- Departure Type (Separating or Retiring)
- Departure Date
- Sender Email

Do you need any additional information about the employee to begin your processes?

Requests

Laptop, Desktop PC, and/or Monitor:

Laptop – Is there a laptop I.T. needs to pick up?

Desktop PC – Is there a Desktop PC I.T. needs to pick up?

Monitor – Is there a monitor I.T. needs to pick up?

- Are these “yes/no” responses?
- Do you ever leave the equipment for the employee replacing the position? Do managers request this?
- Is there any additional information you would like to know for this item?

Printer:

Printer – Is there a printer I.T. needs to pick up?

- Is this a “yes/no” response?
- Do you need to ask if printer rights need to be removed? Or is this not necessary because the computer is removed and reset?
- Do you ever leave the equipment for the employee replacing the position? Do managers request this?
- Is there any additional information you would like to know for this item?

Phone:

Phone – Does the employee have their own phone extension? (Please do not disconnect phone.)

- Is this a “yes/no” response?
- Do you leave the equipment or pick up the phone device as well?

- If the employee has an extension, is this left in place for the employee replacing the position? Do you keep record of who has which extensions? Is the number left blank until a new employee fills the position or is the new employee assigned the next number in the list?
- What are the issues with the manager disconnecting the phone? Is this a common problem?
- Is there any additional information you would like to know for this item?

Specialized Software:

Specialized Software (Ex. Contribute) – Does the employee have any Specialized Software? Please specify the software.

- Do you have a list of commonly requested software that could be converted into a check list? For unique software an “other” option could be included with the list. (A list will help to remind managers of what their staff had access to.)
- Is there any additional information you would like to know for this item?

Shared Drives:

Remove from Shared Drives – (Ex. ComRel) Does the employee have any shared drives? Please specify which shared drives.

- Do you have a list of all available shared drives that could be converted into a check list? (A list will help to remind managers of what their staff had access to.)
- Is there any additional information you would like to know for this item?

Shared Citrix Folders:

Remove from Citrix Shared Folders – (Ex. TCSS) Does the employee have any shared Citrix Folders? Please specify which Citrix folders.

- Do you have a list of all available shared Citrix folders that could be converted into a check list? (A list will help to remind managers of what their staff had access to.)
- Is there any additional information you would like to know for this item?

Vocera:

Vocera – Does the employee have their own Vocera?

- Is this a “yes/no” response?
- Even if the employee does not have a physical Vocera device, do you still need to ask if the employee had a Vocera account?
- Is there any additional information you would like to know for this item?

Notes:

- Is the note field used? If so, what type of notes do you typically receive?

Other Information

- Is there any other information you would like to collect from the manager about the SEPARATING/RETIRING EMPLOYEE?
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Additional Information

Is there anything else you would like to share or improvements you would like to recommend regarding the new employee, transferring employee, and separating/retiring employee process?

Email and Username:

- What information is needed from the NEW EMPLOYEE, TRANSFERRING EMPLOYEE, and SEPARATING/RETIRING EMPLOYEE to add and make updates to the employee's email and username? At what point does this process begin?

Group Email and Distribution Lists:

- What would be the best way to be informed as to which email list the employee needs to be added to? Could this be converted into a checklist that the manager selects from?
- Do you need to be informed that an employee should be removed from an email list? Does this happen automatically for separating/retiring employees?