

New Employee Checklist and Roadmap

Welcome to Enrollment Management at UC San Diego! We are a large, complex institution and there is a lot of information for new employees to take in and process. This “roadmap” is intended to help get your bearings and make sure you have the information and instructions you need to onboard successfully. Your supervisor and HR contacts are here to support you, please do not hesitate to ask any questions.

On or before your first day:

- ☐ [Activate Your Active Directory](#) E-Mail Account and log-in to your workstation
 - ☐ UCSD [O365 Web Access](#)
- ☐ [Register for Two-Step Login](#) required to establish an added layer of computing protection for you and the University
- ☐ [Register for access](#) to campus business systems through Single Sign-On (SSO) (Notify your supervisor that registration and the FERPA training is complete)
- ☐ Complete your [UCPath Self-Service Online Portal](#). Make sure you’ve viewed and updated your personal information (including your Emergency Contacts) and completed your direct deposit information for payroll and expense reimbursement.
- ☐ Complete a [Work Location Status Form \(ucsd.edu\)](#) to share your location and schedule.
- ☐ Complete a [Hybrid Work Agreement if applicable \(Example\)](#)
- ☐ Complete a [Admissions Hybrid Work Agreement](#) if applicable [\(Example\)](#)
- ☐ Complete a [Remote Work Agreement](#), if applicable
- ☐ Review the [EM Flexible Work Arrangement Policy](#) and talk to your supervisor about any flexible schedule requests.
- ☐ Obtain a [Parking Permit](#), [Bus Pass](#) or [explore other commuting options](#).

Before the end of your first week:

- ☐ Meet with Business Office Members for EM Orientation

Team Member	Title, Extension, Areas Covered	Orientation Topics
Liz Mondragon Letty Quijada Irma Mendoza	HR Generalist HR Coordinator (FAS, REG, Analytics, CALSOAP, AVCEM) HR Coordinator (Admissions, Creative Services)	• HR forms and documents • Staff ID Card • Parking Permit • Staff Directory • Timekeeping Policies and Procedures • Payroll Calendar • EcoTime • Requesting Time Off • Leave Accruals • Student Employment and Supervision • Prior Service Verification • Blink / Sharepoint • Business Office Requests
Sharon Lostracco-Johnson	Finance and Operations Analyst	• P- Card • Building Access and Alarms • Procurement • Office Keys • Safety Overview
	Travel and Fiscal Specialist	• Moving Expenses • Travel card/Policies/Support • Nametag • Office Phone • Ergonomics • Business Cards • Employee apparel

- ☐ [Document Vaccine Compliance](#) - Deadline for initial vaccination is within 14 days of the first date of employment; [Ending UC San Diego's "Return to Learn Program"](#) . <https://mychart.ucsd.edu/>
- ☐ Sign your Job Application: Review job application and sign the DocuSign document (initiated by HR contact)
- ☐ Review Job Description: Review your job duties **with** your supervisor and sign the DocuSign document (initiated by HR contact)
- ☐ [Creating an Enrollment Management Outlook Email Signature](#): set up your email signature.

- ☐ [UCPath - State Agency Prior Service Verification eForm](#) - The State Agency Service Verification eForm captures sick leave and service credit for prior employment at the California State University (CSU) or [State of California Agency](#).
- ☐ [Obtain a Staff ID Card](#). Follow the instructions under "Obtain Your First Campus ID Card"
 - Our department will cover the cost of the ID card. You will need to input the project/task information as requested on the form. (HR will provide you this information)
- ☐ Schedule and attend a [New Employee Orientation](#) within your first 30 Days.
- ☐ Schedule and attend a [Benefits Orientation](#) and Enroll in Health Benefits within 31 days of hire.
 - ☐ [Which Medical Plan is Right for you?](#)
 - ☐ [ALEX Benefits Counselor](#)
 - ☐ [Affordable Care Act \(ACA\) Exchange Notice](#)
- ☐ [ACKNOWLEDGMENT of RECEIPT](#)
 - ☐ [Workers' Compensation](#)
 - ☐ [Pharmacy Benefit Network pamphlet](#)
- ☐ Access [EcoTime](#) to view your timecard.
 - [How to submit your hours](#)
 - [2026 Monthly Calendar](#)
 - [Monthly No Exceptions Visual Aid](#)
 - [Entering Exceptions](#)
 - [2026 BW Calendar](#)
 - Please make sure to read Biweekly/Monthly Timesheet Reminder Emails
- ☐ Review the [EM Sick Leave Policy](#), [Lunch Break Policy](#), and [Work Attire Philosophy](#).
- ☐ [Subscribe to Academic Affairs Updates](#)
- ☐ [Subscribe at UC Network systemwide newsletters](#)

Before the end of your first month:

- ☐ Check where you fall on the [EM Emergency Phone Tree](#). Review EM Organizational Charts:
 - ☐ [UCSD Org Chart](#)
 - ☐ [AVC EM](#)
 - ☐ [Office of Undergraduate Admissions](#)

- ☐ [Financial Aid and Scholarships Office](#)
- ☐ [Office of the Registrar](#)
- ☐ [Cal-SOAP](#)
- ☐ [EM Creative Services](#)
- ☐ [EM Business Office](#)
- ☐ [EM Analytics](#)

- ☐ Take a Triton Tour. Learn about UC San Diego from our wonderful Tour Guides by [booking here](#).

- ☐ [Complete Required Trainings](#). Unless noted otherwise, the following are required trainings.
 - ☐ [Safety Orientation: Injury & Illness Prevention](#) – eCourse. Employees should attend an IIPP course within 30 days of hire.
 - ☐ [UC Sexual Violence and Harrasment, Anti-Discrimination, Prevention, and Education \(SHAPE\) Training for Non-Supervisors](#) – eCourse. This class satisfies the legal mandate under California Law. Please complete the course within 2 months from your start date.
 - If you are a supervisor, a Supervisor version will be assigned
 - ☐ [Cyber Security Awareness](#) – eCourse. Required for all members of the University community. Please complete within 6 weeks of your start date.
 - ☐ [UC Ethical Values and Conduct](#) – eCourse. Required for all members of the University community. Please complete within 3 months of your start date
 - ☐ [CANRA \(California Mandated Reporter\)](#) – eCourse. Required for all members of the University community. Please complete within 2 months of your start date.
 - ☐ [FERPA \(Family Educational Rights and Privacy Act\)](#) – eCourse. The purpose of this course is to provide basic FERPA information for UC San Diego faculty and staff. The university is legally and ethically obligated to protect the confidentiality of student records. To be granted access to student records, you must complete this course.
 - ☐ [Privacy at UC San Diego](#) – eCourse. This training covers basic privacy principles and laws and policies affecting privacy at UC San Diego. We will cover laws such as FERPA, HIPAA, and the California Information Practices Act, as well as UC policies related to students, academic personnel, and electronic records, among others. This course is required for UC San Diego workforce members who handle personal data (or systems containing data) classified at P-3 level or higher (can be substituted with UCSD Privacy 101).
 - ☐ [Computer Ergonomics Tier 1 Evaluation and Training](#) – eCourse. Recommended for any employee who works at the computer for 4 or more hours per day, and those that supervise them. Required for represented staff and those that supervise them. If an assessment is needed, please reach out to [Sharon Lostracco-Johnson](#).
 - ☐ [UC Abusive Conduct in the Workplace](#) – eCourse. This training provides an overview of the University of California's Abusive Conduct in the Workplace Policy.
 - ☐ [Workplace Violence Prevention](#) – eCourse. This training was developed in accordance with the training requirements of California Labor Code section 6401.9. Its goal is to help members of the UC community understand and report workplace violence, and to be able to recognize and respond to escalating behavior.

RESOURCES & WEBSITE GUIDE

- [Employee Wellness](#)
- [Principles of Community](#)
- [Office for the Prevention of Harassment and Discrimination \(OPDH\) FAQ \(PDF\)](#)
- [Work/Life – All Aboard \(New Employees\)](#) A more comprehensive overview of this roadmap.
- [UC San Diego New Employee Checklist.](#)
- [Work/Life – Family](#)
- [Work/Life – Culture & Community](#)
- [Work/Life – Professional Development](#)
- [Work/Life – Health & Wellness](#)
- [Work/Life – Financial Planning](#)
- [Personnel Policies for Staff Members.](#) Policies for non-represented staff.
- [Collective Bargaining Units, Union contracts.](#) Policies for represented staff.
- [Absence from Work -](#) This policy provides direction for the accrual, use and recording of all paid and unpaid leave available to eligible Professional and Support Staff (PSS), Managers and Senior Professionals (MSP), and Senior Management Group (SMG) members
- [MapLink \(finding your way around UC San Diego\).](#) Helpful guide to get there from here.
- [Employee Discounts.](#) Learn about the many perks of being a UC employee.
- [Campus Recreation:](#) Learn about staff access to campus recreation facilities.
- [Abbreviations and Acronyms](#)
- [How to verify your UC Employment](#)

DESK PHONE FEATURES/PROGRAMMING & DIALING INSTRUCTIONS

COMMAND	ACTIVATE	DEACTIVATE
Dial out	8+(phone number)	
Internal Call Forward	*2*+XXXXX+#	#2#
External Call Forward	*23#8+XXX-XXXX#	#23#

Call List (Forwarding preprogrammed by ITS)	*10#	#10#
Diversion All Calls	*2#	#2#
Diversion on Busy	*22#	#22#
Campus Ext. Call Back	6	#6#
Last Off Campus Redial	***	
Extension Call Pick-up	Ext. No. + 8	
Group Call Pick-Up	14	
Enable Touchtone*	9	
Common Hold	8	

Speech to Text:

- To activate the Speech to Text feature, submit a [Customer Service Request \(CSR\)](#).
- Once activated, you can listen to your voicemail messages and read the transcripts in your email.
- For more information, contact the ITS Service Desk at 858-246-4357 or ext. 6-HELP.