Useful Links

- [PSP Project Folder](#) (most circa 2016-17):
  - ⬛ OUD On/Offboarding RACI Diagram
  - [Onboarding Swimlane](#)
  - [Offboarding Swimlane](#)
- Josh's Onboarding Clone-Me Tickets
  - [IM-5317](#) CLONEME - Onboarding - DS3
  - [IM-5305](#) CLONEME - Onboarding - Non-DS3
  - [IM-5390](#) CLONEME - OFFBOARDING - NON-DS3
  - [IM-5295](#) CLONEME - OFFBOARDING - DS3 NON-DI
- ⬛ OUD Upcoming Onboardings
- ⬛ OUD Offboarding Tracking Sheet
- ⬛ D-SIP 2024 Interns
- ⬛ Onboarding projects priority spreadsheet - Report from a consultant brought in by P&C to evaluate our onboarding process
- [Google Drive Scanner New Version](#)
- [Temp Employees](#)
- [merged staff forms diagram](#)

Next Time:
-

GUILLERMO: Lets take a look at the [exit checklist](#)

This is a necessity when leaving the University because all individually owned files on Google Drive will IMMEDIATELY become read only, and will be deleted 90 days after the employee's final day. Immediately

Discuss communication to community about manager responsibility

Remind managers who had people leave
Add process 1 month before deletion date about recovery process
Retirements: When there's TOO MUCH advance warning.

[RV] Offboarding & Michigan Giving–can we add a check with MarCom digital team for team member removal with any OUD offboarding?
  - The only individuals who will be listed are:
    - Donor-facing teams (this was a big conversation)

- ■ Executive leadership
  - ○ => add marcom to recipient of the devstaff form delete/update email

Add "The Dev Space" as a google group

1/9/2025

Present: Dylan, Guillermo, Graham
- ● Dyanna Batemen
  - ○ Works in MarCom - currently temp
  - ○ They want to transition her to a consultant
    - ■ This was revealed yesterday to us (1/8/2025)
    - ■ This will be a "Sponsored Affiliate"
    - ■ This takes long time
      - ● Handled by F&A
      - ● She will not be able to work until transition happens with HR
  - ○ What we believe will happen
    - ■ Employee status will run out on Thursday the 16th
      - ● This is already an extension date offered by P&C
      - ● Root cause here is MarCom dragging feet
    - ■ Will lose access to documents
  - ○ Guillermo to contact Kara Fields and Tayna Milligan
    - ■ Likely Diana will lose access to laptop and systems until this contracted process moves forward
    - ■ Should sponsor her ahead of time to retain what we can
    - ■ https://documentation.its.umich.edu/node/247
- ● Onboardings
  - ○ One next week
    - ■ Internal position change - doesn't need new equipment
    - ■ Graham will check in to make sure she is all set
- ● ToDo
  - ☐ Guillermo to talk to Sarah and Amy about sponsorship and ways to sponsor consultants like this if need be
    - ■ After talks with Sarah and Amy - Hiring Manager/F&A will handle the sponsorship. P&C to not be involved
  - ☑ ~~Graham - check in with Jackie Roberts - make sure transition is ok~~
  - ☐ Graham - approve devstaff for Chelsea Brown
  - ☐ G/D - Review Termination checklist

12/12/2024

Present: Dylan, Guillermo, Graham
- Overview of in flight onboarding
  - Temp possibly starting 12/23
    - Michelle trying to have Paul Morin push this to the new year due to proximity with Christmas
    - Need to check holiday ITS hours
      - https://its.umich.edu/news/article/holiday-hours-information-and-technology-services-its-2'
      - Look to be open until Tuesday - Graham to check with Dennis to be sure.
- Offboarding
  - D-Sip devstaff
    - Khadidiatou Toure - Working on recruitment for d-sip program
    - Wasn't given equipment
    - Maddison Ramsey not removed from Devconnect during D-Sip offboarding in August.
      - Need to add a step to insure this happens
  - Termination process
    - Guillermo finalizing a document on HR side
      - Will review this with us next time.
- Next Steps for TDx
  - Ticket Template
  - Testing template to see if autofill is working
- ToDo
  - ☐ Gu - finalizing termination checklist for review
  - ☑ ~~Gr - Elizabeth tickets~~
  - ☑ ~~Gr - ITS IF 12/24 onboarding, doable or nah?~~
  - ☐ Gr - Prep test formstack form for next week
  - ☑ ~~Gr - DSIP offboarding tickets, subtask of~~ [parent](#)
  - ☐ D - Youtube old greg
  - ☐ D - Review `oud-psp-shared@umich.edu` shared settings
  - ☐ D - Prep project plan for TDx

11/21/2024

Present: Dylan, Graham, Guillermo
- Alina - National Major Gifts
  - Update from temp to FTE - already has equipment
  - Just need to upgrade to better machine

- Maurice - Megan Doud's Executive Assistant
  - Before SEason days to fill
- Guillermo will be in seattle Dec 11 - 18
  - Michele will cover in the event we need on site onboarding presence
- Gabrielle confirmed returning equipment on the 27th, around 1. I let her know I will meet her and assist with dropping it off to ITS. - Graham

11/14/2024

Present: Dylan, Graham, Guillermo
- Unrelated - Community day event 11/19
  - Communications are currently though the newsletter
    - Guillermo meeting with Krystal Bednark to define this today
    - Guillermo thinking he would start sending out
  - Any details or a plan set for that day?
    - Plan - as an organization, we're encouraging teams to come in. Similar to our anchor day. It won't be an event for everyone every time.
    - Social hour will always be there
    - DEI neurodivergent day is just coinciding
    -
  - Just trying to plan DI folks coming in and how their day can align with events at WoTo
- Reminder -
  - Gabrielle **W (Dubya)**⛳ hardware return before thanksgiving
  - Made a calendar event to check in with her on 11/22
    - She will return the hardware on 11/26 or 11/27
      - Docs has no American flag emoji so I put golf
- Best way to implement sufyan's work and TDX
  - First - onboard Graham as a tech admin and operations mentor
  - Graham will be part of these for the onboarding of Stewardship & Donor Relations Assistant
- Reworded tech welcome
  - https://docs.google.com/document/d/1S4_xytB2XUem3IaMAjCFGIKkcoBvEpjpnPixDnIUO0Y/edit?usp=sharing
- OARS Requests
  - We need to be putting in the Development department ID, or these seem to be getting routed to the incoming applicant's old department approver.
- ToDo
  - Guillermo to schedule meetings to do overview of these tasks with Graham

11/7/2024

Present: Dylan, Guillermo

- Laptop Stock
  - Should be all set.
- Reviewed in flight onboardings
- Start checking in stock hardware each meeting
- Update shared Calendar with onboarding
- Added calender reminder for Gabriel W laptop return at Thanksgiving

10/31/2024

Present: Dylan, Graham, Guillermo
- Dylan going to softphone office hours
  - What is the policy about an internal employee leaving a department and going to someplace else?
    - Should they get new number?
      - Had someone from engineering - told to keep, then told no and they removed it
    - Depends on the unit - Billed to a department
      - Can take number with them, but would change the billable section on their phone
      - Set billable department on this
  - Any way to get numbers for people before their first day?
    - What do you need to provision one?
    - Any way to expedite this
    - Have to be able to log into zoom as an official employee
      - Can tell
      - Might have to think about a common area phone
        - Order can be put in ahead of time
        - Uniqname should be able to put in request
        -
- Overview offboarding
  - Anna Anderson sudden offboarding
  - Just needs to return laptop - need to reiterate
- Headsets low
  - Should be fine for monday, need an order ASAP
- Exit emails possibly flagged in Gmail
- Want to get back to TDX integration for this process
- ToDo
  - ☑ ~~Dylan to get headsets ordered~~
  - ☑ ~~Dylan to review latitude stock and reorder~~
  - ☑ ~~Graham Review onboarding 1st day email~~
  - ☑ ~~Graham add option for 34" in 1st day email~~
  - ☑ ~~Graham to add note about having "3" monitors total and asking how they want them deployed - if hyrid~~

10/17/2024

Present: Dylan, Graham
- Overview of onboardings in flight
  - Three monday
    - Good on equipment?
    - Blythe
      - Requested Webcam
      - No monitors for house
      - Try to do a second setup for office if there is deskspace
    - Jen
      - Should have preexisting setup
      - Will have full at home
- Reviewed offboarding
  - Erica Jenkins - Offboarded, left equipment in old office
  - Still working with Gabrielle Wiwigacz to get equipment returned from DC in mid November
- ToDo
  - Graham - Update Blythe Request and make sure office is set
  - Jen - Update Dennis on primary work space
  - Validate Erica Jenkins old office - make sure it is a functional setup
  - Quinn first day email[';}"

10/10/2024

Present: Dylan, Graham, Guillermo
- Onboardings
  - Fast Student Temp
- Onboarding calendar?
  - Regis asked if we were utilizing this
  - https://ovpdev.atlassian.net/issues/IM-8759?filter=-3
    - https://calendar.google.com/calendar/embed?src=c_15c7c06e9dc601e137fa3404a0c156a3ba75343ceb9aff5b6bced222ed9e2235%40group.calendar.google.com&ctz=America%2FNew_York
- To Do
  - Graham
    - Approve onboarding, change, and offboarding devstaffs
    - Setup office space
    - Gabrielle Wiwigacz - Offboarding email - **Priority**

10/2/2024

Present:Graham, Guillermo, Dylan
- https://ovpdev.atlassian.net/browse/IM-8759
  - Start Utilizing Calendar view for onboardings?

09/26/2024

Present: Dylan, Graham, Guillermo
- https://ovpdev.atlassian.net/browse/IM-8271 - AzulFin checkbox????
  - Adding half hour meeting with Dylan for all GRA coordinator
    - Will go over home Wifi Setup (McDonalds free WiFi)
- Need to ask if someone is owner of a shared account?
  - https://documentation.its.umich.edu/node/758#Add%20Group%20Members%20to%20an%20MCommunity%20Group
  - Google Shared Accounts
    - Need two people to be owners in the associated MCommunity Group
  - Current managing data document
- ToDo
  - ☐ Dylan to check with ITS. What will happen if an eligible owner ISN'T assigned to an mCommunity of a google shared account moving forward?
  - ☐ Guillermo- Email Carter on issue with student employee
  - ☐ Guillermo - Update onboarding itinerary for GRA coordinator to have meeting with Dylan on basic home network security

09/12/2024

Present: Dylan, Guillermo, Graham
- Current Onboardings
  - Alyssa Murray - All set
  - Jennifer Kim - Verifying when tech onboarding can be done - just needs laptop
  - Tina Vu - Already has laptop from Dsip program
- DevStaff Form Process review
  - Diagram Link
    - For now, we are not touching this
    - GG - What would the rest of the development community (SCUs) do if we did remove this?
    - Could do this via TDX?
      - Issue - IS our DEV instance accessible by those not in OUD?
      - User Submitted form
        - Would enter your access information and submit this to Dev
- Xiong Wang (xiongwan)
  - DI employee

- - - Onboarded on 6/13/2022
    - Last Day was 10/07/2022
    - Was working remote from New York
    - Looking for service tag MIWS1000899
  - ToDo
    - Graham - reach out to Heather on DI for "DevStaff process flowchart"
    - Dylan - Get Graham admin to Dev
    - Graham - Prep ticky for Sara K

08/27/2024

Present: Dylan, Guillermo, Graham
- 2 Onboardings,
  - No issues on either
- Connected with Serena (old ITS intern keeping on)
  - Student employee
  - She is using an ITS provided laptop
    - Has OUD peripherals
    - Will a DevStaff delete when she leaves?
    - Lets add an offboard for this now to offboarding sheet

- ToDo
  - More Monitors - 14?
  - More Keyboard / mice pairs - 10
  - Graham to make ticket for Jayla

08/22/2024

Present: Dylan, Guillermo, Graham
- Reviewed upcoming onboardings
  - Just Serena Touqan - should be ok on hardware
  - Next FTE is TBD for start date (on background check september 9th)
- Slightly low on standard laptops
- Reviewed offboardings
  - All equipment returned, currently clear
- Initial Fields Required
  - Position
  - Unit
  - VPI?
  - Regular / temp / Student?
  - Hiring manager
  - Tech admin
  - Op mentor
  - Work arrangement

- Overview of next steps for TDX project
  - Dylan to add admin for Graham
- Overview of BlueFin onboarding
  - GRA coordinator is not given access to BlueFin right away
    - This process takes time and is arbitrary
      - "When andrea thinks they're ready"
  - Flag incoming GRA coordinators
- Shipping for remote tech returns
  - Priority shipping
    - This should just require the person to print a label and bring it back to a UPS store
    - There is an additional fee with this ($200?)
    - Standard shipping requires actually boxing it yourself
- ToDo
  - Graham open preemptive onboarding for events person Alyssa Murray (Latitude)
    - Guillermo confirming email lyssa.murray4@gmail.com is right
  - Graham open preemptive onboarding for Cassidy Brimer (elitebook)
  - Guillermo to reach out to Andrea to add "contact DI " for Bluefin training

08/15/2024

Present: Dylan, Guillermo,
- Snowy onboarding
  - Guillermo should be here monday
  - She will be taking all equipment home after onboarding
- Serina Tokan
  - Should be good to go
- DMT hiring possible remote
  - 250 applicants
- Assistant director learning and engagement 1st round
- No offboardings to worry about

08/07/2024

Present: Dylan, Sufyan, Regis, Graham
- Project Overview
  - How to condense everything into TDX
  - Still need to figure out work flow
- Forms
  - Current have all information
- Formstack
  - Access questions

- ■ Give same access ask someone else
- ● TDX prepopulated lists
  - ○ Can we have lists that populate from central ITS database
- ● Next Steps
  - ○ Get all assets from Suf into DI
  - ○ Shared Service Center contact
  - ○ Consolidate all documents
    - ■ Charts
    - ■ Interviews
    - ■ Forms
  - ○ Get descriptions of fields and what they are used for
    - ■ For each field
      - ● Use
      - ● Mandatory y/n
      - ● Is data mapped / standardized centrally

07/25/2024

Present: Dylan, Sufyan, Regis
- ● Review of onboarding pipeline
  - ○ Missing DevStaff Updates as an onboarding
    - ■ Emily Godbold's onboarding rushed as a result
    - ■ Future - updates reviewed properly as possible new hires
- ● Review of FTE TDX form
  - ○ How do we control how different users will interact with the ticket during the process
    - ■ Need to be able to modify the ticket
  - ○ Need to look at workflow or possible sub tickets?
  - ○ Can a ticket create a ticket in TDx?
- ● Possible workflow ideas
  - ○ Main ticket makes subtasks?
  - ○ Main ticket is assigned to different people?
- ● merged staff forms diagram

07/23/2024 - Overview of new process

Present: Dylan, Sufyan
- ● Overview of onboarding form in tdx

07/22/2024 - Overview of new process

Present: Dylan, Guillermo, Sufyan
- ● Review new flowchart for suggested process

- - https://lucid.app/lucidchart/615fd022-bb48-44a8-ae61-27b2d420da4e/view?invitationId=inv_e4bbb7d1-fee3-4d49-845a-c3e1842c11c7&page=0_0#
  - Suggestions to separate training from "dart" traini
  - Dev onboarding sheet in TDX
  - Required fields
    - Department
    - Tech Admin
    - Ops mentor
    - Position title
  - Adding fields from onboarding spreadsheet

07/17/2024

Present: Dylan, Heather, Guillermo, Regis
- Update to formstack: [HM] IM-8650 Neighborhood IT feedback for OUD Equipment Request forms
  - Devstaff Change Forms
    - For OUD personal an email generated is the "ITS 4Help notification email"
    - Movement, transfer or removal in OUD
    - => 3 email template? And sending only one?
      - 9 ITS notification emails to manage for DI
      - Changes to an email can be unpredictable
      - Change in the forms impact emails template
      - Dev staff forms email notification catalog
  - Checking with Dennis?
  - Can TDX manage this complexity? Conditional logic in the backend for form
  - merged staff forms diagram
  - Current Response
    - Heather, Dylan, Regis speaking internally, will not be updating DevStaff - looking to implement this in a TDX change later this year
- OARS request - Alena Annarelli
  - Originally Temp employee in P&C
  - Now lent to national gifts
  - Alena "completed training"
    - Approval goes through paul boblit / kevin reigle
- ITS Unit Guide
  - Lost of useless information, some very good information
  - Take some of this and add to PSP resource?
    - How to in one page.
    - Provide this in onboarding
    - Possible printouts in kitchen / trafficked areas.
    - QR Code so it can be scanned
    - Possible first task for Graham
- Response for dress code?

- ○ Not an official code
- ○ You're in a professional environment, act accordingly
    - ■ Donors do come to the building
    - ■ Assume you will meet people
- ○ Business Casual in practice
- ● ToDo
    - ○ Guillermo - to contact Alena / Paul and Kevin
    - ○ Guillermo - Verify has bag, webcam, headset

07/11/2024

Present: Dylan, Sufyan, Regis
- ● [Draft for new process flow](#)
    - ○
- ● Examples of process diagram
    - ○ [CVENT](#)
- ● Should [onboarding survey](#) be reviewed?
- ● Michele Hughes emphasis on company culture
    - ○ What does this look like in practice?
        - ■ Small training session for this
        - ■ Could be included in onboarding itinerary?
    - ○ Need to know what documents she is referencing
        - ■ Says old process is document intensive
- ● Next Steps
    - ○ Documentation
        - ■ Onboarding ToBe

06/27/2024

Present: Sufyan, Guillermo, Dylan
- ● Biggest Pressing Thing
    - ○ Jennifer Edwards
        - ■ Position filled?
        - ■ Failed search for so long - immediate offer extended to this person
        - ■ Coming from MiMed is now already an OUD employee
- ● Martha Bayer offboarding
    - ○ Ops mentor?
    - ○ Martha is still making itineraries for the incoming employees
    - ○ Guillermo will be doing the ops mentoring for these employees
    - ○ Guillermo has been working with Martha extensively on Google Drive
        - ■ She is also not leaving organization entirely
- ● Other offboardings
    - ○ Roy

- ■ To return equipment today or tomorrow
  - ○ Rebecca To
    - ■ Returning equipment on Friday.
  - ○ Richard Komedo
    - ■ To offboard July 12th
- ● Review Sufyan's interview feedback
- ● To Do
  - ☐ Dylan to process offboarding for Richard
  - ☐ Dylan to prep 2 new onboardings
  - ☐ Equipment to be gathered for Martha, Roy and Rebecca on 6/28/24

06/13/2024

Present: Dylan, Guillermo, Sufyan, Regis
- ● Review current status
  - ○ Sabrena Chedid - hiring manager bypassed normal process
    - ■ Guillermo to follow up with HM to discuss how this should be run
    - ■ Laptop should be ready for onboarding date
  - ○ No personal devices!
    - ■ People using personal devices take their OWN security in their hands
    - ■ MiWorkspace devices are covered by university policy
      - ● Have crowdstrike, built in VPN
    - ■ MiMed
      - ● Only allowing PCs with certain level of security onto the university network
    - ■ Add to services page?
      - ● Something going over how security benefits you
  - ○ Recent no equipment temps
    - ■ Hannah Colilli - Craig Alcala
- ● Interview progression
  - ○ Met with Guillermo and Michelle Hugues
    - ■ 85% same
  - ○ Jemika interview Friday, 14th
  - ○ Next steps
    - ■ Diagram refresh
    - ■ Prepare "As-Is" diagraming with Jemika and Michelle process
    - ■ [Can print off current as is](#)
- ● What is our month by month amount of OUD employees?
  - ○ Employee / Temp / D-SIP
    - ■ As of end May 2024 216 Regular employees
    - ■ 39 Temps
    - ■ 20 D-SIp
  - ○ AWA type also
- ● Telefund onboarding

- - Students Done by telefund team
    - Managers follow OUD FTE process
- ToDo
  - ☐ Dylan to order and proof travel machine
  - ☐ Guillermo to create population review spreadsheet
    - Employee count by type with work arrangement
  - ☐ Sufyan to review UML training
  - ☐ Sufyan to start updating as is diagram

06/06/2024

Present: Dylan, Guillermo, Sufyan
- Reviewed upcoming on/offboardings
  - Should be all set, several offboardings in the pipeline
  - 6/24 - three onboardings
    - Will need to verify if hybrid setups need full equipment
- Themes from ⊞ OUD New Hire Onboarding Survey_May 30, 2024_08.17
  - 🗎 Aggregated Onboarding Feedback Columns
  - Feedback from 2022
  - Reviewed this and made some updates.,

05/30/2024

Present: Dylan, Guillermo, Sufyan
- Review [Onboarding](#) Feedback Survey
  - ⊞ OUD New Hire Onboarding Survey_May 30, 2024_08.17
  - Sufyan to aggregate some themes for the write in responses
- Sufyan reached out to Michelle
  - Interview meeting on Monday
  - Student Workers and Temp process
- Jemika Furgenson (jeminoel@umich.edu)
  - D-SIP Intern Process
  - This is completely separate from general onboarding
  - Sufyan to schedule interview
- ITS Internship?
  - Dylan to reach out to Deprist /
- Dylan prepping pre-emptive onboarding for new Prospect Management Analyst
- Next Steps
  - Sufyan to reach out to Jemika - CC dylan
  - Dylan to reach out to Deprist - CC Sufyan
  - Dylan to prep new performance laptop

- ○ Sufyan to aggregate 3-4 themes for each write in question on data from 2022 and onward.

05/23/2024

Present: Dylan, Guillermo
- Intern project
  - ○ Sufyan to go work with Michelle next
  - ○ Sufyan to sit in on onboarding meeting with Dylan / Guillermo for Dev Services Coordinator (Will also have karen parker as an observer)
- Reviewed current on/offboardings
  - ○ Dylan will send tech email for Brady Broderick
  - ○ Paige Bunker will likely be delayed due to lag time in background checks
  - ○ Peg Lutz offboarding should be fine (on Guillermo's team)
- Created new monthly review meeting owned by Dylan

05/16/2024

Present: Dylan, Guillermo, Sufyan
- Overview of the project and processes
  - ○ Different onboarding paths
    - ■ Full time employee
      - Standard onboarding
      - https://lucid.app/documents/embedded/1806da4c-53b1-422c-9634-d1150cd3b454?invitationId=inv_9636bfed-2669-4183-a069-440474851560#
      - Point of Contact - Guillermo
    - ■ Students and Temps
      - https://connect.dev.umich.edu/web/tm/oud-hiring-process-for-temporary-and-student-employees
      - Point of Contact - Michele Hughes (P&C)
    - ■ ITS Interns (School / college / unit internship)
      - Handled by hiring manager? (James Markus?)
      - ITS itself
        - ○ Steps
          - ■ Request by the unit
          - ■ Resume's provided by ITS
          - ■ Interview process with ITS
          - ■ ITS onboarding
          - ■ Intern's first day
    - ■ DSIP interns
      - Point of Contact - Jemika Ferguson, Leann Hill
      - DSIP also all have a dev staff add form

- - - Consultants
        - Point of Contact - Marzban
    - Probably combine DSIP and all SCU internships into one process
        - Once there is an intent to onboard, hiring manager should contact Guillermo (Talent Management)
- Should DevStaff Form be done for interns?

05/09/2024

Present: Dylan, Guillermo
- Need to get back to Margo on onboarding
- WoTo Dorine Bellous - put in request
- Student employees
    - Disconnect between onboarding / offboarding process for students
    - Should there be a split here?
    - Lots going through [Michele directly](#)
    - Form filled out -> goes to something -> Michelle contacts [TMposting@umich.edu](#) (all of F&A and recruiting / talent relations) -> Michelle asks group to process hires -> Guillermo contacts student manager with itinerary (website)
    - Exiting process Add Manager discussion prior to exit email
- Shipping
    - Tia offboarding
        - Shipping labels sent to Tia
        - Tia was told, they don't box / tape / etc and everything MUST come box
        - UPS was also confused about shortcode / billing etc
    - Guillermo mailing books
        - UPS charged him at the office for an envelope in addition to the shipping label
    - **Problem is UPS won't box equipment with the shipping labels LeAnn / Guillermo are printing**
        - Why - This was a standard ground shipping label given
    - **Josh was giving EXPRESS shipping labels**
        - UPS does not charge for the box

04/25/2024

Present: Dylan, Guillermo
- Terminated employee, Meghan Kennedy, not answering emails about laptop
    - Student Employee ignoring manager requests to return laptop
    - Failed to completely onboard in the first place, she never completed her I9
    - Sent terse email requesting laptop back
- Finished current offboardings - up to date
- Offboarding Improvement
    - Issue

- - - Many Students employees have been ignored
      - Process completely skipped
      - We're informed after the fact
  - Current steps to mitigate this
    - Michele is sending email reminders about student employees that are graduating
    - This is mainly ignored.
  - Manager cohort list needs to be re-informed of offboarding
    - Manager is responsible for
      - [Following the exit process](#)
      - Equipment returns
        - Hard to verify what was returned where
        - Harder to follow up with people who are long gone if needed
        - Dylan proposal - Can we make manager / team financially responsible for lost / stolen stuff
      - **Data**
        - **Ensuring they have nothing that will be needed after they are gone**
        - **ITS can not get this back**
    - Guillermo to talk to Amy on this
    - Dylan to prep possible communication to manager cohort
  - What does ITS do when equipment is returned?

04/11/2024

Present: Dylan, Guillermo, Regis
- Keyboard Mouse Combos
  - Agnes needs keyboard / mouse direct shipped
    - Shunying He
    - 226 NW 176th Pl
    - Shoreline, WA 98177
- Room assignment process
  - Discussion between finance and Guillermo to work on this (Amy, David, Brittani, Guillermo)
  - People only get office of Hybrid or On Site
    - Can convert from "Mobile" to hybrid
- Can we make a video of the ITS onboarding process?
  - Would need script or what is covered by ITS in the onboarding meeting
- ToDo
  - RV - Order three keyboard mouse for WoTo
  - RV - Order one for Agnes
  - DM - Market Site for Dylan
  - DM - Coordinate with ITS on Agnes and Emily Morin's equipment

04/04/2024

Present: Dylan, Guillermo

- Agnes -
    - Needs peripherals mailed through dispo
        - Do webcam, headset, keyboard, mouse, 2 monitors, dock? (done)
- Emily - Ship one monitor through dispo
    - Need complete devstaff and submit
    - Needs tech email
- Emily McKiddie
    - Need devstaff approval
        - Done
    - Tech email needed
- PDA problem offboardings
    - Student temps left Jan 1st
    - DevStaff submitted April 4th?
- ToDo
    - Guillermo to reach out to Kristin Gill on offboardings
    - Dylan to do onboarding tasks for above
    - Dylan to go through offboarding for PDA student temps

03/28/2024

Present: Dylan, Guillermo

- Equipment for the off site resource
    - Guillermo connected with Dennis, it will be there monday
- Student employees can be kept "working" even if they don't bill hours

03/07/2024

Present: Dylan, Guillermo

- Need clarification on headset process. These are currently "offered" as an optional addition in the email sent to the candidate.
- **Physical space needs to be clarified. This is a rough area in the process. Not clear who is approving or when, and seems to happen at last moment.**

02/29/2024

Present: Dylan, Regis, Guillermo

- 4 People starting on the 11th
    - Should we split this into two sessions of 2 people
- Equipment needs form

- - Why do we have "How many hours per week will this person be working?"
    - This should be removed
    - Done by Regis
  - Need edit link for this form
-

02/22/2024

Present: Dylan, regis, Guillermo
- [Miro for edit](#)
- Right now process
  - [Our spreadsheet starts as the source of truth](#)
    - Need to have all roles defined (tech admin / ops mentor) when we start process
    - Tech Admin and Ops Mentor overlap was causing confusion
- Need runway for hardware before devstaff form
- Offboarding Access Change
  - [Access removed immediately](#) for many accounts (google
- ToDo
  - Hardware needs form is view only
    - Found
    - Needs to be in the process pre devstaff form
  - Regis meeting with Reed
    - Next Friday (Mar1)
    - Discuss sudden HR / Offboarding change where access was removed immediately
  - Decide if we want to add "number pad" laptop to the Equipment Needs form
    - Followup to see what the use case for these is
  - MCommunity group for Dev On/Offboardings
    - Is there an existing MCommunity group?
    - Adding OUDOn-Offboarding@umich.edu
  - Need to have ITS onboarding scheduled later in the afternoon if it is the 1st of the month.
  - Need to update DevStaff to include "bag" as part of the equipment

02/19/2024

Present: Dylan, Guillermo
- Review open offboardings for equipment
  - Sarahmor ([IM-8629](#))
    - Equipment left in michelle's office at temp desk
  - Ctaggett ([IM-8628](#))

- - ■ Equipment left in Chelsee's office
    - ○ Kasey Ostoka ([IM-8656](#))
  - Josh spreadsheet review

02/16/2024

Present: Dylan, Guillermo
- Guillermo Met with Donna three times to go over expectations
- Dana also said she would have a meeting with Dona on 2/14 for Google Drive transfer and retirement card
- Tech return email for Donna not sent
- Devstaff form
  - ○ Both Donna and Maureen's devstaff were sent very early
  - ○ Donna's change form went out **September 25th**
  - ○ Devstaff for Donna was RE-SENT by Guierrmo on **January 18th**
- **RCA - Donna out of email contact for 2 months prior to leaving (Vacation before season days) and then returned just for half a day**
  - ○ **Solution - P&C reviewing practice of vacation before leaving**
- **RCA - None of offboarding steps that would happen over last two weeks could be done as Donna was on vacation until final day. This lead to everything being done that day**
  - ○ **Need exit checklist explained to manager as well**
  - ○ **Can we send checklist to a personal email as well**
- **RCA - no good reminder after Defstaff**
  - ○ **Setup a reminder email to automatically go out if the DevStaff change form was sent more than 2 weeks prior to the employee's final day**
- To Do
  - ○ Update offboarding to have the following
    - ■ Reminder of Devstaff scheduled
    - ■ Additional hiring manager task to verify employee has offboarding checklist
    - ■ Additional talent relations task to verify the offboarding checklist is done
    - ■ Additional task to explain to hiring manager the exit checklist

02/13/2024

Present: Dylan, Regis,Guillermo
- Review of ToBe Processes
  - ○ Request WoTo Access is done in the 1-2 week period?
    - ■ New Hire can pick up mcard via mail or on first day
    - ■ Dorine does not want access to be given until people have MCard
      - ● This is mitigated by operation mentor or Guillermo letting person in to get mcard the first day
  - ○ Employee not represented currently

- ■ Uniqname
  - ● Validation - recruiters send email with UM Number
    - ○ Email is replied to with uniqname
- ■ MCARD / I9 = Shared Services
- ■ Need validation this is done
- ● Migration Tasks (Internal people moving department)
  - ○ Add step for update form
  - ○ Alec Zimmerman issues where roles were not correct
  - ○ Previous unit communication
  - ○ Difference between internal to the university and internal to Development
- ● ToDo
  - ○ Add Employee as Swim Lane
  - ○ Add "Is Internal" for background check
  - ○ Check inventory / prepare inventory(same time as office assigned)
  - ○ Split MGO question off welcome email
  - ○ Equipment needs form

01/18/2024

Present: Dylan, Guillermo, Josh, Regis (2nd half)
- ● Donna Par is Also offboarding
- ● Maureen Martin Offboarding
  - ○ Didn't go through proper channels due to long timeframe (started in October)
  - ○ Guillermo connected several times for data management
  - ○ Maureen's DevStaff email sent out october 26th
    - ■ This is a kickoff step for many tasks that can't happen until closer to rolloff
      - ● Hardware return
      - ● Update in DevConnect
    - ■ This should be moved to closer to the offboard date
    - ■ Two classes of tasks to be done for offboarding
      - ● Things that can be done ahead of time - immediately upon exit letter sent
        - ○ Giving information to the retiree
          - ■ Offboarding Checklist
          - ■ Equipment Returns Email
          - ■ Data management meeting
        - ○ Offboarding Employee works on Data management steps
          - ■ Google Drive Scanner
          - ■ Drag files into shared drive
      - ● Things that can't be done ahead of time - do when reminder email is sent, 1 week before end date
        - ○ Timely reminder
          - ■ Re-iterate everything to the retiree -
            - ● check in on data management,

- - - go over offboarding checklist again
      - Re-iterate equipment returns
    - Dev Staff Form & OARS
      - Kicks off many processes like removing from room assignments, or removing from DevConnect, Mcommunity Groups
      - OARS access removal requests
      - ITS's in-house offboarding procedures
- DevStaff Add/Delete/Update form
  - This is a synchronization step between all parties
  - What are all tasks?
  - Form is forwarded to dev.staff.chages@umich.edu
    - Also fhillis@umich.edu, bbarkume@umich.edu
    - Different Groups on email
      - PDA
- Exit Checklist
  - Need to add PSP page to go over file reclamation
    - https://connect.dev.umich.edu/web/psp/reclaiming-files
  - Can this be added to the current offboarding checklist?
- Need PSP presentation for directors on offboarding
  - Proposed RACI
  - Google File removal
- Need to spread information on how to use the Google Shared Drive
  - PSP needs to communicate this
  - Need to reference this in our first contact with HM when an offboarding is started

01/04/2024

Present: Dylan, Josh, Guillermo
- Gretchen Pluss documents
  - Team looking to reclaim documents
  - Walked through reclamation process
- Re-stress hiring manager responsibility for getting data
- New MGOs coming on Jan 29th
  - Dylan to meet

11/16/2023

Present: Josh, Dylan, Guillermo
- Ensure equipment offering is up to date
  - Common onboardings covered
  - parts for Mac Users and current cell phone models need updating
- Updated all onboarding for security checklist to Data 100 mylinc

- Review of to be flowcharts for finalization
  - 🟩 OUD Onboarding RACI Diagram
- ToDo
  - Collect list of people offboarded since September 15th
    - Maher Salah - Exit (Campaign)
    - Donna Parr - Retiree (2/14) (Planned Giving)
    - Gretchen Pleuss - Exit (UDE)
    - Ashley Fox - Exit (NMG)
    - Maureen Martin - Retiree (1/18) (CFR)
  - Updates to RACI
    - Color on phases
    - Consistency on naming
    - Assets column

11/09/2023

Present: Josh, Dylan, Guillermo
- Tess - Dylan responded
- Hardware offerings - no longer offer the Surface Studio for travelers.
  - 1 left in stock, keeping it for break/fix of existing ones.
  - Can't order more, and Studio 2 isn't certified by ITS yet.
  - Updated 📄 OUD Equipment Offering to remove its listing
-

10/19/2023

Present: Josh, Dylan, Guillermo
- BRG mention to new hires
  - Part of the OUD new hire orientation
  - PSP also covered by meeting with PSP representative
  - Should this be put in Additional resources of onboarding?
- DART mcommunity groups requested by Kevin Riegle
- Requested mcommunity groups
  - [DART Report Writers](#)
    - Are you an avid builder of reports and dashboards, always on the lookout for the latest updates in data management and reporting? This group is used to communicate updates regarding DART data, Business Objects reports, and Tableau dashboards.
  - [DART Data Updates](#)
    - Are you a part of the University community that relies on DART's constituent management system to complete your work? This group is

used to communicate updates on DART and the DART Data Warehouse including status updates.
- Where should this information live?
  - MiLinc courses are required for OARS access
    - Could MaisLinc course include reference to mcommunity groups?
      - Need to specify which courses
        - [DART DAta Warehouse - BO](#) role requires [DARTEO1 BusinessObjects: Managing Reports](#).
        - Would need details from Kevin to figure out any other OARS Roles that fit the topic, and the required MaisLinc training for them.
  - Update https://connect.dev.umich.edu/web/tm/dart-help
    - Can include on this page
- BCC process should be working in
  - Currently sending email out to EVERYONE on the list when the ticket is created
  - Need to nail this down
- Next steps
  - Dylan to create process flow chart
  - Guillermo to follow up on [devconnect page addition](#)
  - Possible addition to MiLinc courses based on Kevin's feedback
    - Guillermo to check with L&E about training course descriptions (who owns them?)
  - Dylan to investigate JEMH settings for email response

10/05/2023

Present: Josh, Dylan, Guillermo
- 🗊 Managing Your Data
- [New offboarding checklist](#) (Guillermo)
  - Do we shift away from using the google drive scan?
    - What is the difference between google drive scan and ITS tool?
    - Do we like the wording in the document
      - Do we need more? Less?
- Finished offboarding RACI
- Next steps on to be items
  - Onboarding
    - [MGO Equipment Needs email template](#)

09/28/2023

Present: Josh, Dylan, Guillermo
- Verify soft phone setup
  - Plan to give all regular employees softphone
  - Update onboarding itinerary to have employee verify zoom phone setup

- Visit https://its.umich.edu/communication/telephone/zoom-phone
- Verify with F&A (Brittani) If they do not see zoom phone access
  - THey should see the "phone" tab in
  - Emailed Brittani, Regis, David to inform we are doing this
- Offboarding Review
  - Google Drive management
    - Run google drive scanner
    - Run ITS shared files tool
    - If Alumni or Retiree
      - Do best to get storage below 15gb
    - **If not alumni/Retiree, All data will be deleted after 90 days!**
    - **If alumni/retiree, account will be locked if over 15gb and eventually deleted!**
  - DSIP
    - Does this group need extra process?
      - Some interns stay on
        - ToBe
          - Terminate d-sip employment (dev-staff delete)
          - New student employee
        - Why would this not be update?
      - Some don't return gear in timely fashion
    - Guillermo meeting with Jamika to discuss details
      - This is TBD while F&A finds out a proper process
        - Currently a 'termination' so that would be a devstaff delete form, equipment return, access removal. (big can of worms)
  - What if we do not get equipment back?
    - Define new process
      - Verified end date (30 days?)
        - 1-2 reminders
      - After 30 days
        - Go into weekly reminders / nasty grams
        - Inform legal action will be pursued
      - After 30 days
        - Campus security?
- ToDo
  - Guillermo to verify if DSIP to Student Employee process is / will be a dev-staff update or delete.
  - Dylan to followup with Regis about best way to pursue legal action against non-equipment return

09/21/2023

Present: Dylan, Guillermo, Josh

- Overview of ITS "shared with" Tool
- Talk about standardizing google shared drives / shared accounts
  - [Creating Google Shared Drive](#)
    - Pros
      - Automatically makes new files owned by the drive
    - Cons
      - Less granularity with removing people from documents
        - Have to remove someone from the group entirely to get them off
  - [Creating Google Shared Account](#)
    - Pros
      - Can control access at a file level
    - Cons
      - Files made are still created with the users uniqname
- People who leave
  - Normal person (non alumni or retiree)
    - Files immediately become view-only
    - ALL GOOGLE DRIVE DATA WILL BE DELETED **AFTER 90 DAYS**
  - Alumni or retiree
    - Keeps google account
    - Data cap dropped from 250gb to 15gb
    - If user is under 15 gb
      - Nothing happens
    - If user is OVER 15gb
      - Account is locked for editing
      - **Accounts still over this quota in January will be deactivated and marked for deletion**

09/07/2023

Present: Dylan, Guillermo
- Need to start thinking about stakeholders and informing of any new changes
  - One repository all people can see
- Create process flow diagram outlining to-be process to share with stakeholders
  - [Lucidchart software directory link](#)
    - DI has a license under mightyr@umich.edu
- [Worked on offboarding RACI](#)

08/31/2023

Present: Dylan, Guillermo, Josh - short meeting
- Offboarding and Google Drive
  - [Managing your Data When you Leave](#)
  - [ITS Google Shared Files Tool](#)

- - ○ [ITS Data Reclamation Tool](#)
    - ○ Milestone to implement by September 15th
  - ● ToDo
    - ○ Investigate why Jira is not making tickets on comments
      - ■ Test when exclusion removed
    - ○ Reach out to Andrea on the
      📄 GRA Employee Access Requests and Onboarding to add a check for bluefin access.
      - ■ Ask to add a line item for scheduling a blufin meeting with DI to do home IT check
    - ○ Add data reclamation and shared files tools to offboarding documentation

08/17/2023

Present: Dylan, Guillermo, Josh
- ● MGO/VIP Hardware Meeting
  - ○ Ask new hire if they want a meeting to talk about hardware needs
  - ○ Need a way for Dylan to be notified
    - ■ Checkbox on upcoming onboardings for "MGO/VIP"
    - ■ What counts as "VIP/MGO"?
      - ● Any of below:
        - ○ "On-call for emergencies" like Vikki or Regis, qualifies for OUD cell phone
        - ○ Frequent Traveler
        - ○ Deals directly with major gift donors
        - ○ Part of leadership team
    - ■ How to notify DI?
      - ● Try adding comment to spreadsheet, assigning to Ask OUD-DI . Should make a ticket, testing in meeting.
  - ○ Where to add as a step?
- ● Zoom Phone
  - ○ Adding them by default for full time staff
  - ○ Brittani Sweet sets reminder for herself after seeing Dev Staff Add for the Day 1 to set up their zoom phone.
    - ■ Can't be earlier than that, needs their @umich.edu g-suite to be active
- ● GRA Bluefin onboarding
  - ○ Andrea has onboarding sheet for giving Ops Mentor all the specific details needed for onboarding 📄 GRA Employee Access Requests and Onboarding
    - ■ Ask if we can add a spot for bluefin access
- ● ToDo
  - ○ Investigate why Jira is not making tickets on comments
    - ■ Test when exclusion removed

- - Reach out to Andrea on the 📄 GRA Employee Access Requests and Onboarding to add a check for bluefin access.
    - Ask to add a line item for scheduling a blufin meeting with DI to do home IT check

08/10/2023

Present: Dylan, Guillermo
- Next Steps
  - Address TBD items on RACI
    - Zoom Phone Requests
      - Dylan to clarify if this will be a DI task
      - Update DevStaff Add Form?
      - Need to find out if umich email is required for zoom phone creation
        - Can we time box when a zoom phone is activated if email is required?
        - Can we have new hire request this via separate form after day 1 that goes to whoever has access to SRS form?
    - MGO/VIP Equipment meeting
      - **Guillermo** to add to Step 2 meeting instructions
      - **Dylan** to talk with Regis about if this is a DI conducted meeting
    - Discover how HR process is kicked off after offer acceptance - **guillermo** (going to meet with recruiters to discuss this)
      - When an offer is made the HM will make the call (verbal offer)
        - Contingent on background check and final reference check
      - A written offer letter is created to be signed, once signed gets sent to UMHR
      - UMHR takes over with receiving the offer letter
        - Create um ID, I9 paper work
      - Once background check clears, recruiters step away.
    - Decide how to remove response from welcome email
      - Title - Welcome to the University of Michigan
  - Create process flow diagram - Dylan
- AWA
  - Status is going to change to match UMICH guidelines soon.
- Dashboard to track overall competition of onboarding
  - TDX?

07/28/2023

Present: Dylan, Josh, Guillermo
- [Google Drive Scanner New Version](#)
- When is DUO setup done? (DUO set up when uniquename is created)

- - Done with ITS at some point, need to verify
- Updates:
  - Zoom phone needs accountability
  - Add to floormap currently not being done

07/18/2023

Present: Dylan, Guillermo, Josh
- Further RACI review

06/27/2023

Present: Dylan, Guillermo, Josh
- Who is informed when Dev Staff Forms go out?
  - dev.staff.changes@umich.edu
    -
    - [Charlotte Kaye Myers](#)
    - charlomy@umich.edu
    - Alumni
    - OUD People & Culture - Sponsored Affiliate
    -
    - [Danilyn Wilce](#)
    - danilyn@umich.edu
    - Prospect Development Lead Pipeline Analyst
    - Dev Svcs & Strategic Solutions - Faculty and Staff
    - VP for Development - Faculty and Staff
    -
    - [Debbie Roberts](#)
    - debbiero@umich.edu
    - Assistant Director, Finance and Administra ...
    - VP for Development - Faculty and Staff
    - OUD Finance & Administration - Faculty and Staff
    -
    - [David Alan Zubl](#)
    - dzubl@umich.edu
    - Director, Learning & Engagement
    - VP for Development - Faculty and Staff
    - OUD People & Culture - Faculty and Staff
    -
    - [Guillermo Guerrero](#)

- gdomingo@umich.edu
- Talent Relations Associate
- Alumni
- OUD People & Culture - Faculty and Staff
- VP for Development - Faculty and Staff
-
- [Heather McPhail](#)
- hmcphai@umich.edu
- Senior Associate Director Development Rese ...
- VP for Development - Faculty and Staff
- Alumni
- Dev Svcs & Strategic Solutions - Faculty and Staff
-
- [Jemika Ferguson](#)
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- Associate Director Talent Pipeline Program ...
- Alumni
- VP for Development - Faculty and Staff
- OUD People & Culture - Faculty and Staff
-
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-
- [Vikki L Hamilton](#)
- vjab@umich.edu
- Assistant Vice President for Development, ...
-
- [Natalie Wallace](#)
- wnatalie@umich.edu
- Learning and Engagement Specialist

06/22/2023

Present: Dylan, Guillermo, Josh, Regis
- Reviewing RACI and update ASIS
  - Steps that are not present / need updating
  - Changes due to Hybrid model
  - Phones
  - MGO / Remote - Tech Interview
    - Originally only people who were remote
    - Mini interview done with them
      - Talk about 7 accounts that were compromised by MGOs
    - Not everyone has printers
      - Stewardship given home printers
    - How do we update our offering to new employees in regard to hardware options
    - Data / sharing data
      - People want USB key
        - This is not acceptable, use dropbox
    - Have separate meeting to go over the above
      - Do this for remote employees as well?
    - Is this covered by normal ITS training?
      - Not everything - no USB key training
  - GRA onboarding
    - Started taking calls at home
    - Requires security audit due to sensitive data (PCI)
  - Need to think about the new itinerary in terms of AWA status
  - People who get cell phones?
  - uDoIt email
    - Is this being sent? It was sent last until 11/13/2021 since then not sending!
  -

05/23/2023

Present: Regis, Heather, Dylan
- Qualtrics survey edit access
  - Heather has removed for Dylan, Josh, Guillermo
  - Tanya Milligan, Lea Warshaw, Michelle Hughes still have edit access
    - Should we remove? yes
  - All parties can also "close" the survey
- Dylan touched base with Guillermo after onboarding meeting last week
  - He's aware of RACI diagram, but wasn't familiar with what "RACI" is
  - He wasn't aware that DI is involved with the onboarding overhaul process

- - He's receptive to creation of As-Is process, Dylan will set something up for after his vacation
    - Has been working on his own documentation, but hasn't shared this yet
  - LeAnn backup for updating DevConnect when she is on Vacation
    - Heather has been handling this so far
    - Leann has suggested Guillermo, Tammy
      - Tammy is now the backup
      - Will create DevConnect profile only (does not update position record, LeAnn will handle this when she returns).
      - LeAnn also handles delete when she returns
  - ToDos
    - Heather to remove edit access and close access for qualtrics survey from all parties
    - Heather to look for LeAnn documentation on her onboarding / offboarding processes
    - Dylan to schedule meeting with Guillermo to start updated RACI for AS IS process
      - Need to properly understand certain "black box" processes
        - LeAnn Involvement with DevConnect, MCommunity, etc
      - AWA differences
        - When is AWA established?
        - How is equipment / onboarding / etc handled for different types of employee
      - Softphone
        - This was in finance for invoicing
      - Include posting and recruiting
        - This is required for tech preperations
      - Identify teams that are participating - What has guillermo already identified?

05/16/2023

Present: Dylan, Regis, Josh, Heather
- Lots of documentation
- Heather's involvement: Mostly want to loop her in for anything regarding Dev Staff forms that we want to change
  - How do we change up the Dev Staff Forms? What stakeholders do we need to clear things with before we make any updates?
- Review Qualtrics survey access (and results?)
  - Access
    - Josh can login with his @umich.edu credentials
    - Dylan's in, too
   - Sharing it with Guillermo

- - - ■ Heather will look into updating access to read only for these 3
    - ○ NO TOUCHY! Just look at data results. Don't change any of the filters or questions or anything like that. Look with your eyes, not your mouse clicker!
      - ✓ Heather to make access read-only for Josh, Dylan, Guillermo
    - ○ Where is the link being used? We *will* need to update it when the survey is migrated to the umich Qualtrics brand.
- Need to have clear process from initial contact to hardware to onboarding meetings to surveys
    - ○ Copy ⊞ OUD Onboarding RACI Diagram to make an updated '23 version we can go over with stakeholders and fill in with the current as-is version.
      - ■

05/09/2023

Present: Dylan, Josh, Heather, Regis
- Original was a PSP project
    - ○ Was suppose to be cross OUD representation
      - ■ Not much traction
      - ■ PSP recommendation was presented as a "suggestion"
    - ○ Task force fizzled, no drive to adoption
      - ■ OUD Onboarding Task Force Meetings
    - ○ Wrap up presentation
    - ○ Lauren left DI and task force disbanded.
- Scope of project - what can we do ourselves, what do we need to collab with others on, what isn't in scope?
    - ○ Guillermo in P&C dedicated resource for on/offboarding
      - ■ For anything collaboration required, talk to Guillermo to bring in other stakeholders
    - ○ Can do Solo
      - ■ Diagram process as-is, at least for the parts we have visibility on
      - ■ Improve & archive templates in a Knowledge Base - clone-me tickets, template emails.
      - ■ List out our own pain points with current process
      - ■ Update the onboarding survey
        - ● Guillermo, Josh, & Dylan need access to that survey.
    - ○ Collaboration Projects
      - ■ Update the Dev Staff forms for a remote reality - Requires input from stakeholders who depend on these forms
        - ● currently owned by Heather
        - ● Collabs: P&C, LeAnn, others on the dev staff changes dev.staff.changes@umich.edu mailing list
          - ○ Owners are Michele Hughes & David Zubl

- - - ○ Maybe check the Dev Staff Form development records; who were the stakeholders we included in planning the originals?
    - ○ Out-Of-Scope
      - ■ Diagramming parts of the process that are handled internally by P&C or UMHR
- People and Culture Onboarding process review
  - ○ [Onboarding Project Executive Summary](#)
  - ○ [Onboarding projects priority spreadsheet](#)
- Next Steps
  - ○ [Review HR deliverable](#) - Dylan
  - ○ Dylan invited to next onboarding review
  - ○ Heather review access to onboard/offboard surveys
    - ■ Dylan, Josh, Guillermo
  - ○ Dylan schedule next DI meeting
  - ○ Review Draft process for Hybrid with Josh and Regis

○
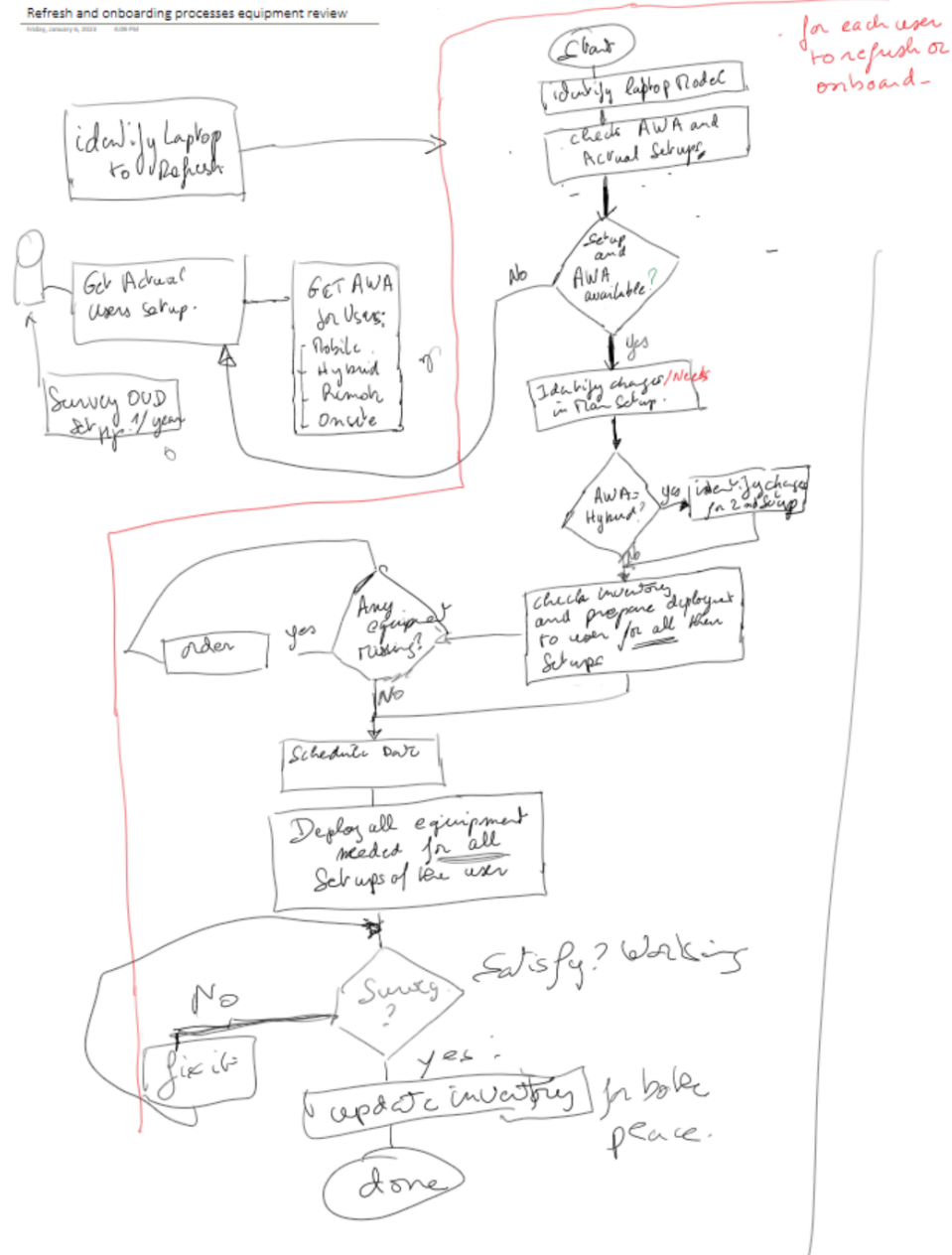
05/02/2023

Present: Dylan, Josh
- Josh's quick re-cap of onboarding process for Dylan:
  - Posting Position
    - HM (Hiring Manager) talks to P&C and their budget people to get permission to post a position, and posts it online.
    - Added to 🗓 OUD Upcoming Onboardings , which is when DI is informed first

- ■ Hiring Manager introduction meeting with Operations Mentor, Technical Admin, and Guillermo (onboarding guy from P&C)
  - ● Fills out [computing needs form](#) for Josh if Josh is not included in the meeting already.
  - ● Creates an e-mail to Josh
    - ○ This needs to be reviewed after X time
    - ○ After X time, compare to inventory and decide if things need to be ordered
  - ● Final result is logging the computer model on OUD Upcoming Onboardings .
- ○ Interviewing & Offer Process - this is handled with P&C and DI has little to no involvement
- ○ Accepted Offer → Welcome Email, kicks off rest of onboarding process
  - ■ Guilllermo sends out an email to welcome the new hire
    - ● CC's hiring manager, F&A stakeholders, Ops Mentor, Technical Admin, Josh, and a few others
    - ● Hardware Pickup -
      - ○ Send out template email
        - ■ Alter for specific times that they will be coming in to pick up. Have to talk to ops mentor for that.
      - ○ If the new hire is more than 1 hour from Ann Arbor, we have to ship hardware to them and make sure ITS can do a remote IT Onboarding.
    - ● Technical Admin Duties
      - ○ Dev Staff Add form needs to be filled out
        - ■ Kicks of misc admin onboarding tasks like LeAnn adding to DevConnect & various mcommunity groups
        - ■ Needs to be approved by Josh (or another DI person) in order to send an automatic email summary of hte dev staff form to ITS, which kicks off their TDX onboarding ticket