

# New hire's Onboarding Checklist



THE UNIVERSITY OF BRITISH COLUMBIA





## **WELCOME TO UBC!**

Congratulations on your new role! The employment agreement is signed, you've confirmed the start date – now it's time to get started with your orientation and onboarding at UBC.

## **HOW TO USE THIS CHECKLIST**

This checklist is designed to help you during your onboarding and includes onboarding fundamentals, how to gain a clear understanding of your role, and suggestions for how to connect with your new team. If you don't have a specific onboarding plan from your manager, we encourage you to check in with them to see what additional onboarding steps they recommend for your specific role.







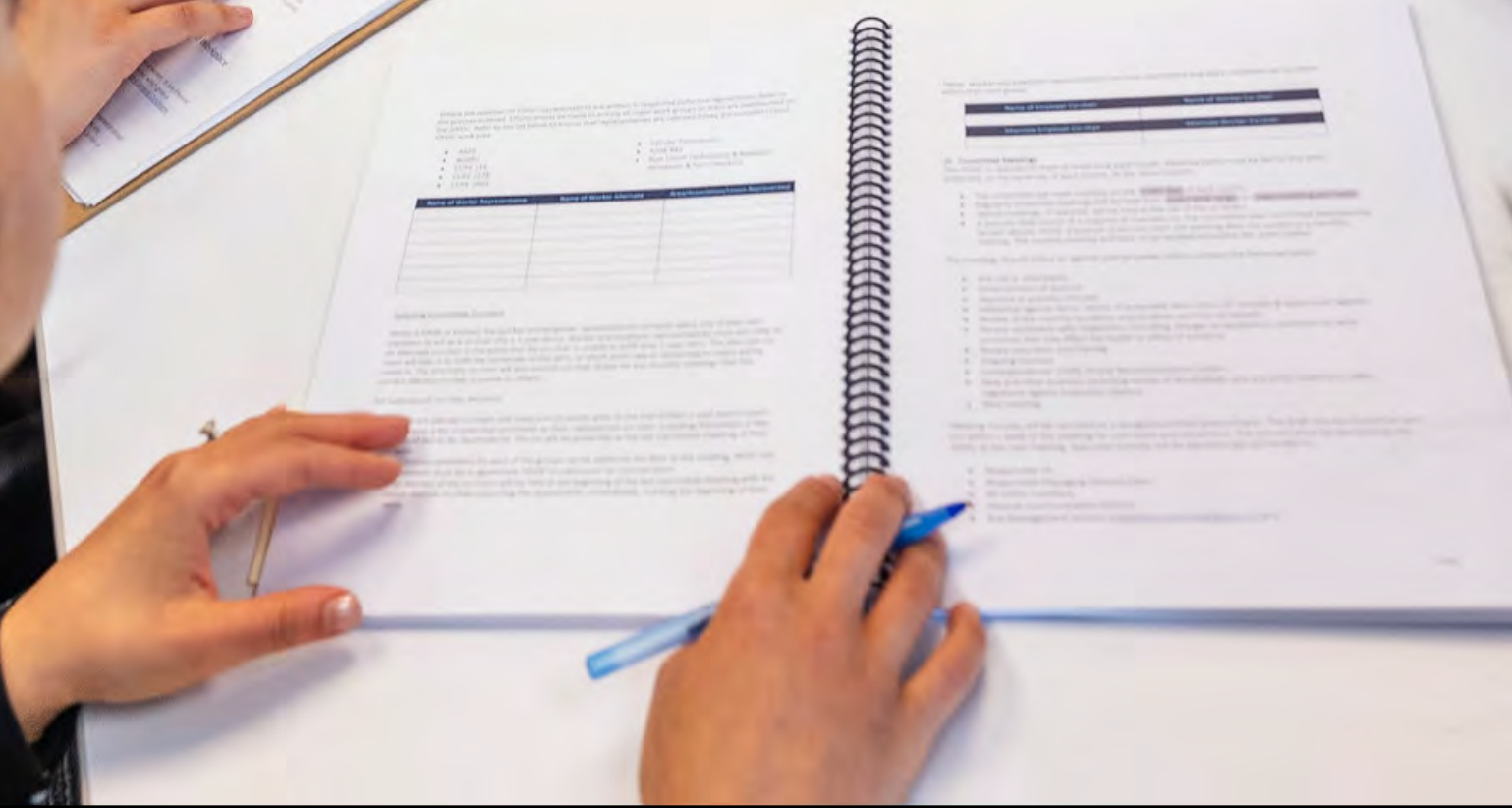
# CONTENTS

*(The Table of Contents is **clickable**. Simply click on any section to jump directly to it.)*

<b>PRIOR TO YOUR FIRST DAY</b>	<b>4</b>
i. Creating your Campus-Wide Login (CWL) Account	
ii. Payroll and benefits elections on Workday	
iii. Preparing for your first day at work	
<b>ON THE FIRST DAY</b>	<b>7</b>
i. Getting settled into your workplace	
ii. Setting up your work essentials	
<b>WITHIN YOUR FIRST WEEK</b>	<b>9</b>
i. General required trainings and job-specific trainings	
ii. Familiarizing yourself with campus resources for faculty and staff	
<b>WITHIN YOUR FIRST MONTH</b>	<b>11</b>
i. Having check-in conversations with your manager/supervisor	
ii. Employee orientations and team meetings	
iii. Reviewing important UBC plans, policies and procedures	
<b>WITHIN YOUR FIRST THREE TO SIX MONTHS</b>	<b>14</b>
i. Onboarding and professional development opportunities at UBC	
<b>IMPORTANT CONTACTS</b>	<b>16</b>

1

# PRIOR TO YOUR FIRST DAY



Name of Member Representative	Name of Member Associate	Address/Telephone Number

Name of Member Representative	Name of Member Associate

1. The following is a list of the members of the committee who have been elected to the committee for the year 2023/24.
1. The following is a list of the members of the committee who have been elected to the committee for the year 2023/24.
  2. The following is a list of the members of the committee who have been elected to the committee for the year 2023/24.
  3. The following is a list of the members of the committee who have been elected to the committee for the year 2023/24.
  4. The following is a list of the members of the committee who have been elected to the committee for the year 2023/24.
  5. The following is a list of the members of the committee who have been elected to the committee for the year 2023/24.
  6. The following is a list of the members of the committee who have been elected to the committee for the year 2023/24.
  7. The following is a list of the members of the committee who have been elected to the committee for the year 2023/24.
  8. The following is a list of the members of the committee who have been elected to the committee for the year 2023/24.
  9. The following is a list of the members of the committee who have been elected to the committee for the year 2023/24.
  10. The following is a list of the members of the committee who have been elected to the committee for the year 2023/24.

2. The following is a list of the members of the committee who have been elected to the committee for the year 2023/24.
1. The following is a list of the members of the committee who have been elected to the committee for the year 2023/24.
  2. The following is a list of the members of the committee who have been elected to the committee for the year 2023/24.
  3. The following is a list of the members of the committee who have been elected to the committee for the year 2023/24.
  4. The following is a list of the members of the committee who have been elected to the committee for the year 2023/24.
  5. The following is a list of the members of the committee who have been elected to the committee for the year 2023/24.
  6. The following is a list of the members of the committee who have been elected to the committee for the year 2023/24.
  7. The following is a list of the members of the committee who have been elected to the committee for the year 2023/24.
  8. The following is a list of the members of the committee who have been elected to the committee for the year 2023/24.
  9. The following is a list of the members of the committee who have been elected to the committee for the year 2023/24.
  10. The following is a list of the members of the committee who have been elected to the committee for the year 2023/24.





## Prior to your first day

The first part of your onboarding will be on [Workday](#), UBC's finance and human resource management system. To access Workday and many other UBC employee sites, you will need to create your **Campus-Wide Login (CWL) account**.

### i. Create your Campus-Wide Login (CWL) Account

**Follow the email instructions from UBC IT to activate your CWL account.** Within 24 hours after your employment agreement has been signed, you will receive an email from UBC IT with instructions on how to activate your CWL account.

*If you are a returning UBC employee, your original CWL account will be automatically reactivated within 24 hours after your employment agreement has been signed – no further action is required.*

**Set up your [Enhanced CWL \(Multi-Factor Authentication\)](#).** To enhance cybersecurity, access to some UBC sites may require the use of multi-factor authentication with your CWL account.

### ii. Complete your payroll and benefits elections on Workday

You will receive emails from Workday with a series of onboarding tasks to complete based on your role. It is recommended that you complete pay-related onboarding tasks before or on your first day so that the information needed to process your pay is set up correctly for your first pay.

It is also recommended that you familiarize yourself with and enrol in benefits (if your role is eligible for benefits) before beginning your role as eligible employees are entitled to benefits from the first day.

**Complete your payroll information on Workday**, including your contact information, direct deposit setup and payment elections, and federal and provincial tax elections. Visit [UBC Finance's Payroll website](#) for additional information about payroll and taxes, and to access the [payroll calendar](#) for important dates.

**If eligible, enrol in Benefits on Workday.** To complete this, you will need your Social Insurance Number (SIN) and the Personal Health Number (PHN) for you and your dependents. There is a helpful [Benefits Enrolment Guide](#) and a [how-to video](#) you can follow for step-by-step guidance.

The [Integrated Service Centre](#) (ISC) offers support with Workday questions, issues, and requests. Here, you can submit a Workday support request, speak with a representative, or search their Workday knowledge base.

Below are some knowledge base articles that may be beneficial as you navigate your onboarding on Workday:

- [How to use the Workday Knowledge Base](#)
- [How to complete your Onboarding in Workday](#)
- [Setting up direct deposit or payment elections](#)
- [Filling out federal and provincial tax elections](#)
- [Required Onboarding and Job Specific Training](#)

### iii. Prepare for your first day at work

**Review information about [Hybrid work at UBC](#) to see how it may apply to your role.** Your manager or supervisor will contact you prior to your first day with details about your first day, including whether you will begin your work in person or remotely.

**If applicable, discuss any accommodation or accessibility support needs with your manager or contact the [Centre for Workplace Accessibility \(CWA\)](#)** should you not want to disclose your disability to your manager. The CWA is available to support you with resources to help remove barriers in the workplace for faculty and staff with disabilities or ongoing medical conditions.

**Plan your commute to campus with information about [sustainable commute options and campus parking](#)** to make your travel to, from and on campus a breeze on your first day.

A woman with dark hair pulled back, wearing a black shirt with a white and blue floral pattern, is sitting at a wooden desk in an office. She is smiling and looking towards the camera. On the desk in front of her are two laptops, a blue water bottle, a calculator, and a conference phone. The background shows a glass partition and a white wall with a blue stripe.

**2**

**ON THE FIRST DAY**



## On your first day

### i. Meet with your manager/supervisor and get settled into the workplace

**Tour the workplace with your manager or onboarding buddy** and meet the people you will be working with. Learn where to find important spaces and supplies such as the kitchens/lunchrooms, bathrooms, emergency exits, meeting spaces, first-aid kit, and supply stations.

*NOTE: Your manager may also assign a colleague from your department to act as an onboarding buddy. They can help you to build new connections in the department, answer general questions, and be available to check-in with you regularly within your first few months.*

**Meet with your manager/supervisor and discuss work expectations.** Examples could be:

- Regular work hours, hybrid work arrangements/guidelines, and job description
- Communication and working styles, and expectations for requesting time off
- Overview of technology, software and platforms available and what the team uses
- Organizational structure and team landscape, highlighting areas of collaboration

### ii. Set up your essentials for work

**Retrieve any keys or access cards required for building access and any other equipment essential to your job** from your manager or department administrator.

**Apply for a [UBC Card](#)**, UBC's official identification card that functions as your Employee ID and library card. For some departments, the UBC Card will also serve as your building access card.

**Sign in and familiarize yourself with your [UBC Faculty and Staff email \(FASmail\)](#) account.** If you are new to UBC, you will have received an email from UBC IT with instructions on how to set up your FASmail account. If you are a returning employee, your original FASmail account will be automatically reactivated.

*NOTE: Some departments may have administrators complete email account setup on your behalf. Some departments may also provide you with a department-specific email account.*

**[Create an on-brand email signature](#)** for work emails.

**If applicable, test your devices to ensure they are [configured for working off-campus](#), including VPN access.** Troubleshoot with your manager or submit a ticket to UBC IT if needed.

**[Ergonomically set up your workstation.](#)** Whether you are working in an office, classroom, lab or remote work environment, proper ergonomic design of your workspace can minimize the risk of a wide range of work-related injuries. If desired, you can request an ergonomic assessment.





**3**

**WITHIN YOUR FIRST WEEK**



## Within your first week

### i. Complete all general required trainings and begin job-specific training

Complete the [UBC general required trainings](#). You will receive an onboarding task in Workday for each course you are required to complete within the [Workplace Learning Ecosystem \(WPL\)](#).

**Review documentation and information relevant to your role.** Ask your manager/supervisor for any additional training manuals or transition documents that you can keep for future reference.

*NOTE: Additionally, your team members may schedule peer-instructional sessions with you to train or transfer knowledge on relevant applications and processes.*

**Learn about administrative processes and procedures, including those specific to your role** (e.g. sick leave, vacation and attendance tracking, and purchasing).

### ii. Familiarize yourself with campus resources for faculty and staff

Complete the [New to UBC Orientation Course](#) (either for the [Vancouver](#) or [Okanagan](#) campus).

This course is the one place where new hires can find and explore everything you need to know about UBC, including campus resources, services, information, and community networks.

**Familiarize yourself with [UBC's health and wellbeing resources](#)**, in particular the resources available to support your [mental health](#). Here, you will be able to learn about the Employee and Family Assistance Program (EFAP) and access many of the resources available to help you and your dependents.

**Check out [UBC's perks for faculty & staff](#)** to find information on employee discounts and other perks available at UBC's attractions, recreation and fitness centres, and other campus services.

**Explore the [UBC Today](#) website** for the latest news, updates, events, useful dates and curated resources from across UBC especially for faculty and staff. **Ask your team what other university newsletters you should consider subscribing to.**

**Regularly check the [UBC Events calendar](#) and [UBC HR Events page](#)** to stay up-to-date with exciting events and opportunities happening on campus.



4

## WITHIN YOUR FIRST MONTH



1) INTUITIVE WEBSITE PATHWAYS - ALTERNATIVE ROUTE

User who easily navigates to CSC landing page via Contact page

ubc.ca homepage, or any subsequent page

Minimal user experience to search for help via Contact page

Contact page

Clear messaging added to top of page: "Looking for help?"

Direct pathway through clearly presented "Help?" button

CSC landing page



## Within your first month

### i. Have check-in conversations with your manager/supervisor

Have check-in conversations with your manager/supervisor on a regular basis. Some important conversation topics may include:

- Onboarding needs and administrative support.
- Work expectations and best practices. Discuss hybrid work program if applicable.
- Top priorities for your role and where you should be focusing your efforts to start. Discuss ongoing projects and progress, or explore project management tools that would be suitable for you and/or your team.
- Your team's strategic priorities/goals and how you contribute to them.
- Your progress towards your performance goals. Seek feedback where appropriate.
- Social connection and networking opportunities.

### ii. Participate in employee orientations and team meetings to get situated in your work

**Participate in team meetings and introductory meetings with colleagues to learn about how you will work together and any ongoing projects you may be involved in.** Also connect socially with your colleagues and team members. This can include a team lunch, coffee chats with colleagues, orientation and other campus events, and exploring the campus community.

**Register for department-wide orientation events and meetings, where applicable,** to learn about the culture, priorities, and practices of the faculty/department, onboarding resources, and meet with your colleagues. In some departments, there may be a dedicated HR professional responsible for orientations who will connect with you directly.

**Learn about [campus-wide Orientations & Onboarding events](#)** to support building cross-campus connections and a sense of community. These include:

- **New to UBC Orientation Course on WPL Canvas:**  
This course is the one place that new hires can find and explore everything they need to know about UBC, including campus resources, services, information, and community.
- **Welcome to UBC Staff Orientation:**  
This event welcomes new staff to UBC with speakers and activities to learn more about UBC and our priorities, ways to be engaged in the campus community, and the opportunities available.



- **New Faculty Teaching Orientation:**

Hosted annually, this event welcomes and supports new faculty to learn about the academic culture, policies and practices, and resources available to support their teaching, research and service.

- **Benefits@UBC Webinar for Faculty and Staff:**

This webinar helps new hires learn which benefits they are eligible for and how to access them including Extended Health and Dental, Life Insurance, EFAP, and Tuition Waivers.

### **iii. Review important UBC plans, policies and procedures**

Review the [collective agreement and terms of employment](#) for your employee group and note down important contacts for your union group or labour association. If applicable, attend any member orientation sessions offered by your union group or labour association.

#### **Review relevant strategic initiatives**

- [UBC's Strategic Plan](#)
- [Focus on People](#)
- [Strategic Equity & Anti-Racism Framework](#)
- [Indigenous Strategic Plan](#)
- [Wellbeing Strategic Framework](#)
- [Climate Action Plan](#)

#### **Review UBC's policies and procedures. Here are a few to get you started.**

- [UBC Statement on Respectful Environment](#)
- Policy GA4 – [Records management](#)
- Policy SC1 – [Health and Safety](#)
- Policy SC5 – [Snow](#)
- Policy SC7 – [Discrimination](#)
- Policy SC13 – [At-Risk Behaviour](#)
- Policy SC14 – [Information Systems](#)
- [Security Standards](#)

A photograph of three women in a garden. One woman is crouching and holding a basket of raspberries, while the other two are sitting and looking on. A text box is overlaid on the image.

**5**

**WITHIN YOUR FIRST  
THREE TO SIX MONTHS**





## Within your first three to six months

### i. Continue to explore onboarding and professional development opportunities at UBC

**Continue to have check-in conversations with your manager/supervisor on a regular basis.**

Have a conversation with your manager about your probationary period and prepare for your [performance conversation](#) (CWL required).

**Check out learning and professional development resources and opportunities at UBC.** Examples include:

- [Professional development funding](#)
- [Tuition waiver benefits](#)
- [Coaching services and solutions](#)
- [Conflict Theatre](#)
- [Workplace learning opportunities](#)
- [Indigenous Learning Pathways \(Indigenous-focused learning\)](#)
- [Antiracism and Inclusive Excellence events](#)

**Complete the 30-Day and 3-month Entrance Surveys when prompted in Workday.** These surveys will appear in your Workday inbox after 30 days and 3 months, respectively. Feedback from faculty and staff in these Entrance Surveys are aggregated and will help inform and shape ongoing improvements to UBC onboarding programs and processes.

6

## IMPORTANT CONTACTS







## Who to contact for help

- For Workday issues or questions: submit a support request through the [UBC Self Service Portal](#) or call 604 822 8200 for UBC Vancouver or 250 807 8163 for UBC Okanagan.
- For questions about your benefits coverage, visit [hr.ubc.ca/benefits](https://hr.ubc.ca/benefits), or [connect with a benefits specialist](#).
- For questions around your onboarding experience, or resources available to you, contact the Orientations & Onboarding team at [workplace.orientations@ubc.ca](mailto:workplace.orientations@ubc.ca). We would also love to hear your feedback on this resource.
- For workplace accommodation and accessibility support, contact the [Centre for Workplace Accessibility](#) and speak confidentially with a Workplace Accessibility Specialist by phone at 604 822 8139 or by email at [workplace.accessibility@ubc.ca](mailto:workplace.accessibility@ubc.ca).
- The [Sexual Violence Prevention and Response Office](#) (SVPRO) offers confidential support for those who have been impacted by any form of sexual or gender-based violence, harassment or harm, regardless of where or when it took place.