Virtual Onboarding for Managers
Virtual Onboarding – Resources for Managers
This is a guideline for virtual onboarding and speaks to the current processes as of April 14th, 2020.

DESIRED OUTCOMES OF VIRTUAL ONBOARDING

1. Onboarding fundamentals are completed
2. New hire is set up with all of the IT hardware and software required to execute their role
3. Create a virtual environment that encourages connections and fosters relationships with other team members
4. New hire has a clear understanding of their role within the team and current remote working environment
5. New hire has tasks/projects they are able to accomplish given their current state

Manager’s Checklist

Prior to first day:

☐ Ensure new hire is included in all team meeting, mailing lists and any online channels used by your team for project work and social connection

☐ Ensure new hire has the hardware and software needed to be successful remotely. Request this from IT (central or inhouse depending on your department) two weeks prior to new hire’s start date https://it.ubc.ca/ubc-it-guide-working-campus
  - Currently when new desktop or a laptop is issued, the very first log-in has to take place while on a campus network in order for the initial authentication process to complete. The desktop team is currently working on a work around for this.

☐ Ensure new hire has completed the following:
  - Set up their Enhanced CWL (https://privacymatters.ubc.ca/learn-about-enhancedcwl)
  - Reviewed payroll information and completed a direct deposit form (https://finance.ubc.ca/payroll)
  - Enrolled in Benefits and the staff pension plan (if applicable) (http://www.hr.ubc.ca/wellbeing-benefits/benefits/getting-started/enrolling-in-benefits/online-enrolment-assistance/)
  - Enrolled in the faculty pension plan (if applicable) (https://faculty.pensions.ubc.ca/overview/#enrolment)
    - *New hire will only be able to access and complete above process if they have a CWL. A CWL can be created after an employee id is set up for the new hire.*
Schedule daily check ins with new hire during first week (can be less frequently after this as comfort builds)

Select a team member to act as a buddy for new hire (if desired). Team member should have a clear understanding of their role and time commitment. A buddy is someone who will introduce team culture, and who the new hire can connect with when they have questions. The buddy should also be available for informal “coffee chats” to help create connection and trust

Have team members schedule welcome conversations with the new hire in their first few weeks (to build trust through social engagement)

Have team prepare a short bio with photo, contact details and remote working style. This should be compiled and shared with the new hire in a welcome message on their first day

Within the first week:

Day 1, manager ensures new hire is met by the correct person onsite for IT set-up (if applicable)

Manager to have introductory 1:1 with new hire on first few days (video conferencing recommended if available)

• Introduce team landscape/projects/initiatives that the new hire will be working on and responsible for
• Share remote working style and remote work expectations with new hire
• Build trust with new hire

Provide new hire with time to complete the following:

• Complete andatory training within first two days (approx. 2.5 hours) (https://wpl.ubc.ca/?query=UBC%20Mandatory)
• Review their payroll and personal information for accuracy (https://finance.ubc.ca/payroll/your-pay/ubc-faculty-staff-self-service)
• Review Orientations & Onboarding website (https://www.hr.ubc.ca/orientation/)

Encourage your new hire to ergonomically set-up their remote-workstation (if applicable) (http://www.hr.ubc.ca/wellbeing-benefits/workplace-health/ergonomics/office-ergonomics/mobile-computing/)

Schedule a virtual team meeting for introductions (when possible, use video conferencing technologies to facilitate interpersonal communication)

Provide overview of the technology available/ what the team uses

Buddy to offer frequent check-ins with new hire (if desired)
Within the first two weeks:

- Have team members to schedule peer-instructional sessions to train new hire on relevant applications and processes they will be using.
- Show new hire team administrative processes (sick leave, vacation/attendance tracking, etc.).
- Encourage your team to connect socially with new hire over online collaboration channels.
- Provide new hire with tasks they can accomplish while working remotely. Consider what level of access and equipment the new hire currently has (consider an outcomes-based approach to work over hours worked).
- Provide new hire with time to become familiar with the following initiatives:
  - UBC’s Strategic Plan (https://strategicplan.ubc.ca/)
  - Focus on People (https://focusonpeople.ubc.ca/)
  - Wellbeing Strategic Framework (https://wellbeing.ubc.ca/framework)
  - Inclusion Action Plan (https://equity.ubc.ca/about/strategic-planning/ubcs-inclusion-action-plan/)
  - Indigenous Strategic Plan (https://indigenous.ubc.ca/indigenous-engagement/indigenous-strategic-plan/)
- Provide new hire with time to review role specific information and documentation.
- Consider that “overcommunicating” is helpful in this time of uncertainty. Anything less could lead to a sense of isolation for new hire.

Within the first three months:

- Schedule regular check-ins with your new hire.
- Prepare your new hire for a performance conversation within their probationary period (http://www.hr.ubc.ca/administrators/performance-development/).
- Questions to consider asking your new hire during check-ins:
  - What are you most proud of so far?
  - What I appreciated about your performance was [provide details].
  - What has been your biggest challenge(s)?
  - What did you learn from these challenge(s)?
  - What support could I / the team / the university give you?
  - What are your goals moving forward?
  - What are your measures of success?
  - What I would like to see you continue/focus on moving forward is [provide details]
  - How can I / the team support you to achieve these goals?
Tips for successful performance conversations:
- Performance is owned by the person so ensure they talk more than half of the time.
- Encourage dialogue by asking open-ended questions such as “Tell me more about...”, “Help me to understand...”, “How can we...” etc.
- Provide constructive feedback that focuses on the work performed.
- When ending the conversation, ensure they leave with a sense of achievement, clarity and purpose.

Engagement tools to consider using during remote work:
- Skype for Business
- Zoom Video Conferencing
- https://it.ubc.ca/ubc-it-guide-working-campus#staying_connected

Additional resources for managers:
- http://www.hr.ubc.ca/administrators/managing-staff/new-employee-checklist/
- http://www.hr.ubc.ca/faculty-staff-resources/telecommuting/
- https://wellbeing.ubc.ca/workplace-wellbeing-resources
- https://www.it.ubc.ca/telecommute
- To support teaching at UBC:
  - https://keepteaching.ubc.ca/
  - https://ctlt.ubc.ca/

Share your feedback
If you have any questions or feedback on this resource, please contact workplace.orientations@ubc.ca
### VIRTUAL ONBOARDING AT A GLANCE

This diagram offers suggested onboarding actions – at a glance – for both a manager and new hire to consider during a new hire's first few weeks.

#### MANAGER

<table>
<thead>
<tr>
<th>2 weeks before start date</th>
<th>1 week before start date</th>
<th>Weeks 1 &amp; 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Confirm what software and hardware new hire has for working remotely</td>
<td>- Add new hire to mailing lists</td>
<td>- 1:1 Welcome meeting (with video if available)</td>
</tr>
<tr>
<td>- Provision access to drives and technology required for remote work</td>
<td>- Add new hire to regular meeting invites</td>
<td>- Share link to team bio (photos, remote working styles)</td>
</tr>
<tr>
<td>- Arrange IT in office set up for day 1 (building access, relevant person to greet)</td>
<td>- Add new hire to formal informal virtual collaboration tools/channels</td>
<td>- Begin team “coffee chats”</td>
</tr>
<tr>
<td>- Ensure employee ID is set up</td>
<td>- Assign buddy (where applicable, at manager’s discretion) and share details about buddy role</td>
<td>- Arrange all-team virtual meeting</td>
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**DAILY CHECK-INS**

- Share administrative processes
- Daily Check-In

**NEW HIRE**

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<td>- Create CWL</td>
<td>- Set up Enhanced CWL</td>
<td>- Review and complete payroll, benefits, &amp; pension enrollment</td>
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<tr>
<td>- Test tech set up (in office/if required)</td>
<td>- Start Mandatory Training (finish day 2)</td>
<td>- Visit Orientation and Onboarding website</td>
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<tr>
<td>- 1:1 Welcome video call with manager</td>
<td>- Check your personal and payroll information</td>
<td>- Read UBC Strategic plan and initiatives</td>
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**DAILY CHECK-INS**

- Daily Check-Ins with manager
- Daily coffee chats with team
- Peer system process training
- Buddy check-ins (if applicable)
VIRTUAL ONBOARDING – HOW TO SET UP NETWORK ACCESS

This flowchart offers a look at how to set up network access for a new hire. Note this may look different across different departments.

IT Support

- Procure and image hardware
- Deliver hardware to Manager’s office
- Process request and generate CWL & FASmail access
- Notify Manager request is complete

Manager/Administrator

- Request for CWL & FASmail access for new hire
- Send CWL & FASmail access info to new hire
- Set up virtual meetings with team and new hire
- Notify and arrange new hire to drop by office to activate hardware
- Manager to contact IT to resolve issues

New Hire

- Follow access instruction to set up and test CWL
- Employee ready to start onboarding

Resolve issue for manager and new hire

Start virtual work

Employee ready to start onboarding

Issues with hardware or set up? Yes

Drop by office to meet manager to set up hardware

No

Start virtual work