
New Hire Onboarding Checklist template

**Managers: How to use this template**

A helpful onboarding plan will be unique. There may be onboarding resources relevant to your new hire based on their role, team, department/unit, work arrangement and so on.

As their manager, you will best know what will be useful to them.

The **Manager’s Onboarding Guide** is designed to be a starting point for your local onboarding plan and help guide your interactions as a manager with your new hire during their first weeks.

Review and customize this **New Hire Onboarding Checklist template** to meet local needs and provide to your new hire on or prior to their first day.

*For a copy of the Manager’s Onboarding Guide and the New Hire Onboarding Checklist template, visit UBC HR’s* [New Employee Checklist and Orientation](https://hr.ubc.ca/managers-admins/onboarding/new-employee-checklist-and-orientationhttp%3A/www.hr.ubc.ca/administrators/managing-staff/new-employee-checklist/) *page (CWL required).*

Welcome to UBC!

This resource 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 during the current remote working environment.

On your first day

* Set up your [Enhanced CWL.](https://privacymatters.ubc.ca/learn-about-enhancedcwl) Have your Campus Wide Login but trouble logging into some sites? To enhance cybersecurity you will need to set up multi-factor authentication for your CWL.
* Login and complete your tasks and to-do’s in [Workday](https://hr.ubc.ca/working-ubc/welcome-workday) Onboarding
	+ Set aside 2 hours to complete the [UBC mandatory trainings](https://ubc.service-now.com/selfservice?id=kb_article&sysparm_article=KB0016812).
	+ Set aside 1 hour of uninterrupted time to complete your [payroll](https://finance.ubc.ca/payroll) and [benefits](https://hr.ubc.ca/benefits/eligibility-enrolment/enrolling-benefits) enrolment (Have your Personal Health Number, Social Insurance Number, direct deposit information on hand to complete this process for you and your dependents)
	+ Review your personal and contact information for accuracy
	+ Troubleshoot any Workday issues through [Service Now](https://ubc.service-now.com/selfservice)
* Review UBC [Orientations & Onboarding website](https://www.hr.ubc.ca/orientation/) and access the [Orientations & Onboarding WPL catalog](https://wpl.ubc.ca/browse/orientation-and-onboarding) for resources designed and curated by the UBC Orientation & Onboarding team. Be sure to register for the Welcome to UBC event!
* Test your [virtual set-up and access](https://it.ubc.ca/ubc-it-guide-working-campus), troubleshoot with manager if needed
* Your manager will schedule check-ins with you
* Your team will schedule virtual or in person introductions with you
* *Manager: add additional items...*

During your first weeks

* You will have frequent check-ins with your manager. Topics to consider:
	+ Onboarding needs or administrative support
	+ Progress and performance goals
	+ Social connection and networking
* Time to review documentation and information relevant to your role.
* Ergonomically set-up your [workstation.](https://hr.ubc.ca/health-and-wellbeing/ergonomics/office-ergonomics)
* Introductory conversations with colleagues on your team. Learn about their roles and how you will work together.
* Introduction to projects and initiatives you will be working on and supporting.
* Peer-training on relevant systems and processes.
* Create an [on-brand email signature](https://brand.ubc.ca/e-mail-signature-generator/?login) using this generator.
* Explore the [UBC Today](https://ubctoday.ubc.ca/) website for the latest news, updates, events, useful dates and curated resources from across UBC, curated for faculty and staff by Internal Communications.
* Ask your team what university newsletters you should consider subscribing to.
* Review relevant strategic initiatives:
	+ [UBC’s Strategic Plan](https://strategicplan.ubc.ca/)
	+ [Focus on People](https://focusonpeople.ubc.ca/)
	+ [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/)
	+ [Wellbeing Strategic Framework](https://wellbeing.ubc.ca/framework)
* Review UBC’s policies and procedures:
	+ [UBC Statement on Respectful Environment](https://hr.ubc.ca/sites/default/files/wp-content/blogs.dir/14/files/UBC-Statement-on-Respectful-Environment-2014.pdf)
	+ Policy GA4 – [Records management](https://universitycounsel-2015.sites.olt.ubc.ca/files/2019/08/Records-Management-Policy_GA4.pdf)
	+ Policy SC1 – [Health and Safety](https://universitycounsel-2015.sites.olt.ubc.ca/files/2019/08/Health-and-Safety-Policy_SC1.pdf)
	+ Policy SC5 – [Snow](https://universitycounsel-2015.sites.olt.ubc.ca/files/2019/08/Snow-Policy_SC5.pdf)
	+ Policy SC7 – [Discrimination](https://universitycounsel-2015.sites.olt.ubc.ca/files/2019/08/Discrimination-Policy_SC7.pdf)
	+ Policy SC13 – [At-Risk Behaviour](https://universitycounsel-2015.sites.olt.ubc.ca/files/2019/08/At-Risk-Behaviour-Policy_SC13.pdf)
	+ Policy SC14 – [Information Systems](https://universitycounsel-2015.sites.olt.ubc.ca/files/2019/08/Information-Systems-Policy_SC14.pdf)
	+ [Security Standards](https://cio.ubc.ca/information-security/information-security-policy-standards-and-resources)
* *Manager: add additional items...*

Within your first three months

* Continue to have regular check-ins with your manager.
* Have a conversation with your manager about your probationary period and prepare for your [performance conversation](https://hr.ubc.ca/career-development/performance-conversations).
* Consider ways to [grow your career](https://hr.ubc.ca/career-development) at UBC.
* *Manager: add additional items...*

Share your feedback

If you have any questions or feedback on this resource, please contact workplace.orientations@ubc.ca.