New hire's Onboarding Checklist

New Hire Onboarding Checklist

Welcome to UBC!

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.

Workday

Workday is UBC's finance and human resource management system. You will receive emails from Workday with tasks and to-do's that you must complete as part of your onboarding.

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:

- How to use the Workday Knowledge Base
- How to complete your Onboarding in Workday
- Required Onboarding and Job Specific Training
- How do I enroll in benefits and pension as a new hire?
- How do I - view my benefits?

On your first day

- ☐ Set up your Enhanced CWL. Have your Campus Wide Login (CWL) but trouble logging into some sites? To enhance cybersecurity you will need to set up multi-factor authentication for your CWL.

- ☐ Complete all of your onboarding tasks in Workday:

    - Complete your payroll information, including your primary address, payment election, direct deposit task and tax elections. Not completing this in a timely manner could impact your pay.

    - Personal and contact information, Government ID, and Federal & Provincial Tax elections will be the next tasks assigned to you

    - If eligible, you will receive a task in your Workday inbox to enrol in Benefits. To complete this, you will need your Social Insurance Number (SIN) and the Personal Health Number (PHN) for you and your dependents.

    - Complete the UBC mandatory trainings. Workday will link you to the trainings you are required to complete within the Workplace Learning Ecosystem (WLE).

- ☐ Review UBC Orientations & Onboarding website and access the Orientations & Onboarding WPL catalog for resources designed and curated by the UBC Orientation & Onboarding team. Be sure to register for the **Welcome to UBC Orientation** event!

- ☐ Your manager will schedule check-ins with you

- ☐ Your team will schedule virtual or in person introductions with you

- ☐ If applicable, test your virtual set-up and access, troubleshoot with manager if needed

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
  - Discuss the remote work program, if desired

- [ ] Time to review documentation and information relevant to your role.

- [ ] Ergonomically set-up your workstation.

- [ ] 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 using this generator.

- [ ] Explore the UBC Today 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.

- [ ] Explore some of the onboarding and learning opportunities available:

  - Orientations & Onboarding WPL Catalog
  - Indigenous learning resources for staff and faculty
  - Antiracism and Inclusive Excellence events

- [ ] Review relevant strategic initiatives:
  - UBC's Strategic Plan
  - Focus on People
  - Inclusion Action Plan
  - Indigenous Strategic Plan
  - Wellbeing Strategic Framework
  - Climate Action Plan

- [ ] Review UBC's policies and procedures:
  - 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

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](#).

☐ Consider ways to [grow your career](#) at UBC.

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 or eligibility: benefitsinfo@hr.ubc.ca or call 604-822-8111 between 8:30 a.m. - 4:30 p.m.

- For questions around your onboarding experience, or resources available to you, contact the Orientations & Onboarding team at workplace.orientations@ubc.ca. We would also love to hear your feedback on this resource!