

Employee Onboarding Checklist

For Managers & Supervisors

UBC Student Housing and Community Services

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Employee Onboarding Checklist

This checklist is here to help you make sure that you've effectively onboarded new hires and that you've covered key details relevant to the position.

- ✓ Complete a paper copy.
- ✓ Check, initial, and date items once you have completed them.
- ✓ Skip items that are not applicable.
- ✓ Keep the original on file.

Questions?

Please contact your SHCS HR Coordinator.

Before your employee starts

Task	Done?	Mgr/Supvr Initials	Date Completed
Arrange your schedule to spend time with the new employee on their first day and in the first week.	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>
Make immediate team aware of the arrival of the new employee and their role.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Ensure workspace is set up, clean and ready with all appropriate supplies and tools, including an office chair.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Prepare an individual onboarding/training plan for the new employee and make any required training arrangements.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Schedule employee for a New Employee Orientation Session.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
IT Setup Order and arrange through SHCS IT—as soon as your new hire has accepted the position, to allow for setup time. <ul style="list-style-type: none">▪ Order computer▪ Order new office phone or reassign existing phone to new employee▪ Request access to appropriate drives and listserves	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

UBC email addresses are now set up automatically, effective October 2022.

Task	Done?	Mgr/Supvr Initials	Date Completed
<p>Send new hire information to Payroll/HR, as applicable:</p> <ul style="list-style-type: none"> ▪ Legal name ▪ SIN & birthdate (only if hired without a posting) ▪ Address, phone, email ▪ Job requisition number ▪ Job classification / title ▪ Start date (1st day worked) ▪ Salary / pay rate ▪ Copies of their resume, interview notes, reference checks 	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<p>Send onboarding package to your new hire (unless you're giving it to them on Day 1).</p>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<p>Ensure employee created CWL at <i>activate.id.ubc.ca/iamweb</i> and set up an Enhanced CWL for security at <i>privacymatters.ubc.ca/enhancedcwl</i>.</p>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<p>Ask employee to order their UBCCard online at <i>ubccard.ubc.ca</i>.</p>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<p>Ask employee to enter certifications into Workday. (e.g., Food Safe, First Aid, Red Seal or other trades certifications, etc.)</p>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<p>Order business cards (from SHCS Purchasing), if applicable.</p>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<p>Building/Room Access (keys, access card).</p>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<p>Provide info on how to get to campus, like transit, carpooling, and parking. More info at <i>transportation.ubc.ca</i>.</p>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<p>If working in an office setting, encourage hire to check out ergonomics info and register for a training session at <i>hr.ubc.ca/health-and-wellbeing</i>.</p>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<p>Child Care only: advise employee to email <i>oph.info@ubc.ca</i> to book an immunization review with an Occupational Health Nurse.</p>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

On your employee's first day

Task	Done?	Mgr/Supvr Initials	Date Completed
Welcome the employee and discuss First Day/First Week schedule.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Provide onboarding package, if not sent to them already + review the departmental dress standard.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Show the employee the following websites and recommend they review in more detail: <ul style="list-style-type: none"> ▪ hr.ubc.ca/working-ubc/your-first-days-ubc ▪ ubctoday.ubc.ca/staff-resources/new-to-ubc 	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Show new employee to their physical workspace; ensure they have the required office supplies.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Discuss departmental emergency procedures and provide important phone numbers. (e.g., Campus Security, 604-822-2222; First Aid 604-822-4444.)	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Review AED/EpiPen procedures.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Review work and break schedule (refer to relevant collective agreement) and review departmental policy on signing in/out or end of day procedures.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Computer and telephone orientation: systems access, email, voicemail.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Review job description, key skills, competencies, and expectations.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Discuss development plan, probationary period and set goals/expectations for first milestone.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Meet with employee at end of first day to answer any questions.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

During your employee's first week

Task	Done?	Mgr/Supvr Initials	Date Completed
Review payroll at finance.ubc.ca/payroll (paydays, deductions, etc.).	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Review departmental Org Charts.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Ask employee to set up their email signature using UBC's email signature generator at brand.ubc.ca/e-mail-signature-generator .	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
New hire completes all mandatory training courses at shcs.ubc.ca/orientation or in-person if required. They will need to log in with their CWL.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Discuss absence reporting procedures, including late arrivals and calling in sick.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Discuss leave usage: Vacation, stat holidays, medical/dental appointments, sick time pertaining to employment group.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Review departmental policies and procedures and, if available, your department's employee handbook.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Review department website/intranet, shared drives, filing system, administrative work practices, etc.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
If employee is a supervisor, please develop supervisor training for them:	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<ul style="list-style-type: none"> ▪ Roles & responsibilities ▪ Training, performance management, and discipline ▪ Supervising in a unionized environment course 			

During your employee's first month

Task	Done?	Mgr/Supvr Initials	Date Completed
Review applicable site-specific safety procedures.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Review UBC Strategic Plan at strategicplan.ubc.ca .	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Speak to UBC's Vision and Values (ubc.ca/about/vision-values) and SHCS's Vision and Mission (shcs.ubc.ca/about).	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Review benefits at hr.ubc.ca/wellbeing-benefits/benefits .	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Review departmental standards (out-of-office replies, email etiquette and signature, customer-facing communication, etc.).	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Discuss how you will support the employee throughout the onboarding process, schedule regular meetings, (e.g., performance discussions, 1:1 meetings, etc.), and the employee's training plan—plus mutual expectations.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Ask employee to review UBC policies and procedures (#s GA4, SC1, SC5, SC7, SC13, SC14) at universitycounsel.ubc.ca/policies .	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Ensure employee is signed up for their Employment Group Orientation and provide information about the next UBC-wide orientation.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
Ask employee to review UBC health and wellbeing programs, resources and benefits at hr.ubc.ca/health-and-wellbeing .	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
If there are any performance challenges, document and discuss with HR well before the end of the probationary period.	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>