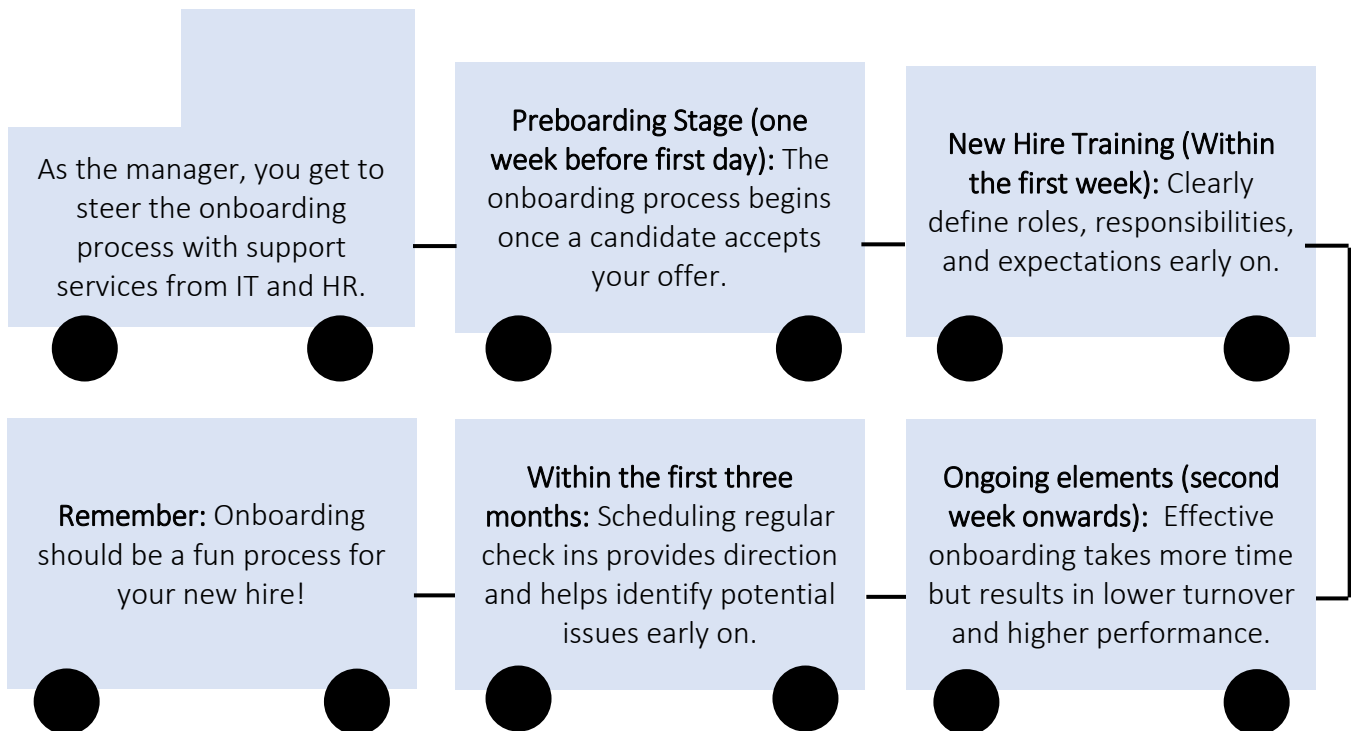




## Onboarding Guide for Managers

### Brief Breakdown of the Onboarding Checklist Stages



### Pre onboarding Stage

- Your chosen candidate should have signed the employment contract by now which will allow you to move from the recruitment stage to the pre onboarding stage
- Complete [onboarding setup](#) in Workday. Contact HR to ensure that you get the right information from the new hire to set up their workday profile
- [Select Workday](#) trainings that relate to your new hire's role in addition to the trainings required for all UBC employees listed below.
  - **“UBC General Required Courses (Vancouver)”**
    - Preventing and Addressing Workplace Bullying and Harassment
    - New Worker Safety Orientation
    - Workplace Violence Prevention Training
    - Privacy & Information Security - Fundamentals Part 1
    - Privacy & Information Security - Fundamentals Part 2



- Recommended Courses (role dependent) – Recommend Manager browse through trainings online to select suitable training for new hire.
  - [Wellbeing in the Workplace](#)
  - [Workday Basics](#)
  - [Workday Essentials for Salaried Staff](#)
  - [Workday Essentials for Hourly Staff](#)
  - [Workday Finance Foundations](#)
- Contact [MedIT](#) to request the appropriate hardware and to ensure that the new hire has access to the appropriate accounts and services two weeks prior to the start date. Consider if the role is in person, online or hybrid. If applicable, ensure that their hardware/software is set up for remote work.
- Consider if your new hire requires additional UBC property to be issued such as:
  - A [UBC Visa](#) card
  - I.D. cards, building access, and time cards, keys and codes
  - Office equipment for remote use (e.g. computer, [cell phone](#), etc.)
  - Materials (e.g. binders, reference materials, files, textbooks, etc.)
  - Uniforms, security identification, name tags, etc.
- Let your team members know that the new hire is joining the team. Encourage your team members to reach out and introduce themselves to the new hire.
- Invite your new hire to all team meetings, mailing lists and online channels used by your team for project work
- Call or email your new hire with any important information related to their first day (ie. What time to arrive or start work, scheduled plans for their first day, etc.)
- Set up a work location for your new hire (ie. Desk)
  - Ensure that you make the necessary accessibility accommodations if applicable (ie. Wheelchair accessible)
- Consider the “buddy system”: Pairing your new hire with a buddy can provide more peer-to-peer support
- Map out the training plan for your new hire and decide the relevant people to involve in the training
- Refer the new hire to the Department of Family Practice employee onboarding guide
- Connect with HR to ensure that your new employee is hired under the appropriate SUPORG.
  - If a new Workday SUPORG (Supervisory Organizations) is needed, this request must be sent to HR. SUPORG set questions can go to Adrian Whitehead, HR Assistant or Annie Lai, Assistant Manager of Human Resources.
  - Security Role requests, please contact Marni Fraser, Director, Administration at [marni.fraser@ubc.ca](mailto:marni.fraser@ubc.ca).



## New hire training

### Day 1

- Welcome and express excitement about your new hire joining the team
  - Lead a tour of the building (ie. Lunchroom, bathroom, safety, etc.)
  - Encourage new hire to set up their workstation
  - Establish an open-door policy and integrate company values into the discussion when possible
  - Set up a 1-1 meeting with your new hire to discuss your working style, and work expectations as well as any projects/initiatives that they will be working on. Here are some guideline questions for your first one-on-one meeting:
    - What motivates you the most? (This helps you understand what environments, challenges and rewards motivate your new hire)
    - What kinds of projects excite you the most?
    - What is your preferred method of communication? As Manager, outline your expectations of communication – e.g. phone, video conferencing, email, etc.
    - How often do you expect to receive feedback?
    - How can I help? Do you have any questions for me?
  - After your initial 1-1 and subsequent meetings, reflect on the following:
    - I was able to communicate general expectations clearly with the new hire.
    - I was able to take time and connect with the new hire.
    - I was able to establish a communication tool between the new hire and other employees/team members.
    - I communicated the general expectations clearly with the new hire.
- 
- Introduce your new hire to the team through a scheduled virtual or in-person meeting. Ensure that they have each other's contact information
  - Provide time for your new hire to complete Workday Onboarding tasks and required trainings (direct deposit set-up, benefits enrolment, required training courses)
  - Ask the new hire to think about their SMART goals for their position  
The goals can follow the SMART format (**S**-Specific, **M**-Measurable, **A**-Adaptable, **R**-Realistic, **T**-Time-targeted)



### Ongoing elements

- Set up regular check-ins with your new hire. Aim to meet with them weekly for at least the first month.
  - Share general expectations
  - Discuss where the new hire should be focusing their efforts to start
  - Give constant feedback and make corrections along the way
  - Share how the new hire's role connects to the bigger picture of the company and the team's goals
  - Check in to see how the new hire is performing towards their own personal goals
- Encourage your team to connect socially with the new hire
- Review role-specific information and documentation together
- Encourage new hire to become familiar with the following initiatives:
  - Faculty of Medicine: [Equity, Diversity & Inclusion](#)
  - Faculty of Medicine: [Vision and Values](#)
  - UBC's [Indigenous Strategic Plan](#)
  - UBC's [Focus on People](#) approach
- Provide new the hire with time to review the following university 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 System Policy](#) & [Information Security Standards](#)

### Within the first three months

- Prepare your new hire for ongoing [performance conversations](#) to identify areas of growth and goals. Keep in mind that the structure of the review depends on the employee group. For any performance documents, please forward a copy to your HR contact to be kept on file.

### PHO Declaration Requirement – Positions located within a healthcare facility

- Positions located within a healthcare facility are required to have successful verification of full vaccination against COVID-19 prior to the start date, as required by a provincial health mandate. Please verify here: [Qualtrics link](#)
- Visit the [BC Government website](#) for updates on vaccination requirements



### Remote work

- Refer your new hire to the [Hybrid Work at UBC](#) page if necessary
- Employees must have an informed conversation before filling out the [Remote Work Request Form](#)

### Questions or Feedback?

Please reach out to Annie Lai, Assistant Human Resources Manager, at [annie.lai@ubc.ca](mailto:annie.lai@ubc.ca)

### Department HR Team Structure

- **Maria Jurado, Manager, Human Resources** - Point of contact for tenured/academic faculty employee lifestyle. Escalated questions and concerns including performance management and employee relations.
- **Annie Lai, Assistant Manager, Human Resources** - Escalated questions and concerns for Term Faculty and Clinical Administrators employee lifecycle. Provides advice on HR Operations and HR best practices including onboarding, recruitment, HR communications, and learning and development.
- **Adrian Whitehead, HR Assistant**- Point of contact for 1<sup>st</sup> level Staff and Student (e.g. M&P, CUPE 2950, Non Union Research Technicians) questions, Workday HRIS, Payroll Processing
- **Ara Silva, Clinical Faculty Coordinator** - Clinical Faculty Appointment and Reappointment Process, Clinical Faculty Promotion Process, TTPS

### UBC Wide HR Resources and Support Teams

The following is a reminder on services provided by other Central HR departments and units on certain items:

- **Payroll** – if you have a payroll issue that cannot be resolved on a departmental level, please contact Integrated Service Centre at <https://isc.ubc.ca/> or 604-822-8200 (UBCV)
- **Workday** – If you are experiencing issues with onboarding, enter information, or locate information on Workday, please contact <https://isc.ubc.ca/> or 604-822-8200 (UBCV) or visit Workday Resources at <https://isc.ubc.ca/resources>
- **Benefits** – Questions about enrollment on benefits or support on benefits can be addressed to [benefitsinfo@hr.ubc.ca](mailto:benefitsinfo@hr.ubc.ca) or 604-822-8111.
- **Pensions** – Questions on staff and faculty pension plan are found here <https://staff.pensions.ubc.ca/contact/> or <https://faculty.pensions.ubc.ca/>
- **Learning and Development – Online Courses/Trainings** – Many new hire orientations, trainings, and additional training resources can be found here <https://wpl.ubc.ca/>