Checklists for onboarding/departing employee

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| **EMPLOYEE:** |  | **EMPLOYEE Number:** |  |
| **TYPE of Position:**  *(Select one only)* | Staff  Faculty  Student | **Cwl:** |  |
| **position:** |  | **unit:** |  |
| **START Date:** |  | **End Date:** |  |
| **hiring manager:** |  | **phone number:** |  |
| **Term of Appointment** | Start Date:  End Date:  Ongoing | **Type of Appointment**  *(Select one only)* | New Hire  Transfer |

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| **ONBOARDING: Before Arrival** | **Responsible Member:** |
| Process new hire in Workday  Generate employment agreement | HR |
| Provide parking information (<http://www.parking.ubc.ca/>) | EA |
| Confirm start date and time for first day. Where to meet on the first day | Manager |
| Welcome email prepared for dissemation to unit(s) | Manager |
| **Access** | |
| Workday access arranged <https://irp.ubc.ca>  Employees will get email from workday on how to set up as self, including instructions to create [Campus Wide Login account](https://it.ubc.ca/services/accounts-passwords/campus-wide-login-cwl) (employee completes)  Provide [Workday Self Service portal](https://ubc.service-now.com/selfservice?id=kb_view2&kb_knowledge_base=af5ffe361b8ad4105edd43b4bd4bcb09) information  Vacation / sick time request instructions in workday  [FOM Workday](https://mednet.med.ubc.ca/AboutUs/StrategicPlanning/InitiativesAndProjects/IRP-Workday/Pages/default.aspx) resources | HR |
| Building / Office access (swipe card):  Fill out [form](https://mednet.med.ubc.ca/HR/Staff-HR-Resources/Orientation/Documents/New%20Employee%20Form%20-%20FOM%20Dean%27s%20Office.pdf) for Finance, Facilities (office key, alarm codes), Voice Services, IT, Communications, Purchasing  ☐ Provide hospital access procedures | EA |
| **Office Preparation** | |
| Clean workstation, configure workstation with standard office equipment (wastebasket, stapler, recycle bin, pens, notebook, etc.), order office furniture as required | EA |
| Order nameplate for office door – Facilities | EA |
| Order business cards from [Xerox](http://xeroxprintservicesubc.ca/) if required. | EA |
| Credit card(s) as required (OPT) – contact [ubc.visa@ubc.ca](mailto:ubc.visa@ubc.ca) | EA |
| **IT Systems and Access** |  |
| Set up computer  Request MEDIT system access (usernames and passwords, email account, internet access, network drive access, servers/directories access, required software, Teams – add too appropriate Teams/channels) – Done through [form](https://mednet.med.ubc.ca/HR/Staff-HR-Resources/Orientation/Documents/New%20Employee%20Form%20-%20FOM%20Dean%27s%20Office.pdf) | EA/Manager |
| Order/transfer mobile phone, tablet, desktop and/or laptop  Telephone and voice mail activation via [form](https://mednet.med.ubc.ca/HR/Staff-HR-Resources/Orientation/Documents/New%20Employee%20Form%20-%20FOM%20Dean%27s%20Office.pdf). | EA |
| Have employee added to appropriate Faculty of Medicine email distribution lists. | EA |
| **First Day** | |
| Disseminate welcome email | Manager |
| Provide location information to obtain [UBC Card](http://ubccard.ubc.ca/), and office keys from [UBC Access Desk](http://ubccard.ubc.ca/contact-us) | Employee |
| Provide information to all student, faculty and staff if they are working at a PHO site. They must complete an online, confidential declaration of vaccination status. As part of the process, you are asked to disclose your vaccination status as follows:  ·       Visit [**https://ubc.ca1.qualtrics.com/jfe/form/SV\_8qvhh1UQG4Q3CCO**](https://ubc.ca1.qualtrics.com/jfe/form/SV_8qvhh1UQG4Q3CCO) to complete the PHO declaration. It includes questions about your COVID-19 vaccination status. Employee ID is required. Please note below:  If you indicate that you are fully vaccinated, you will receive further communication outlining how to verify your vaccination status with the appropriate documentation.    Provide information vaccination requirement and vaccine passport upon entry into Care Facility (on point grey campus includes – UBC hospital (Koerner), Purdy Pavilion, Detweiller Pavilion, Centre for Brain Research). | Manager |
| Provide information on remote work arrangements <https://hr.ubc.ca/remote-work-staff>  Ensure [Remote Work Request Form](https://ubc.service-now.com/selfservice/?id=kb_article&sysparm_article=KB0017812) is uploaded into workday, review and approve | Manager |
| Schedule one-on-one or group meetings with team members and manager, as appropriate | EA/Manager |
| Calendar view(s) for office colleagues - Team vacation Calendar | EA/Manager |
| Place employee on distribution lists , UBC Directory | EA |
| Update organization chart | EA |
| Update website and office directory | EA |
| Provide copy of job description (if not already done during recruitment process) | HR/Manager |
| Provide information to set up [Virtual Private Network](https://it.ubc.ca/services/email-voice-internet/myvpn).  Test [virtual set-up and access](https://it.ubc.ca/ubc-it-guide-working-campus), | Manager |
| Go over employee orientation checklist | Manager |
| Go over Teams site and channels | Manager |
| **Office Orientation** | |
| Review office procedures such as dress code, confidentiality, and security procedures surrounding office windows, vacation/sick time reporting and alarms. | Manager |
| Review safety and building evacuation procedures/meeting location | Fire Warden |
| Supply a copy of campus map, org chart, and other job- related documents and materials (e.g., job manual, UBC training information, background materials) | Manager |
| [MedNet](https://mednet.med.ubc.ca/Pages/default.aspx) orientation – where to find information | Manager |
| Office tour (including washrooms, kitchen, drinking water tap, office supplies, first aid kits, manual door lock) | Manager |
| **Mandatory Training** | |
| Inform that all employees must complete the following (will receive prompts in workday):   * [New Worker Safety Training](http://rms.ubc.ca/training-and-general-education-courses/mandatory-training-for-all-ubc-workers/#New Worker Safety Training) * [Workplace Violence Prevention Training](http://rms.ubc.ca/training-and-general-education-courses/mandatory-training-for-all-ubc-workers/#Workplace Violence Prevention Training) * [Preventing and Addressing Workplace Bullying & Harassment Training](http://rms.ubc.ca/training-and-general-education-courses/mandatory-training-for-all-ubc-workers/#Prevention of Workplace Bullying & Harassment Training) * [Privacy & Information Security](https://privacymatters.ubc.ca/fundamentals-training) * [Active Shooter Preparedness](http://rms.ubc.ca/emergency/emergency-procedures/active-shooter/)   Other  [Safety Supervision at UBC](http://rms.ubc.ca/training-and-general-education-courses/mandatory-training-for-all-ubc-workers/#Safety Supervision at UBC) | Workday |
| **First Month** | |
| Register for next University Wide Orientation session when available | HR |
| Register for ADLP or Managing@UBC through Central Human Resources if appropriate | HR |
| Information on <http://www.hr.ubc.ca/coaching/>  Information on workplace learning opportunities, through workplace learning ecosystem and Linkedin Learning. <https://hr.ubc.ca/career-development/workplace-learning-opportunities>  Information on [professional development funding](https://hr.ubc.ca/career-development/professional-development-funding) | Manager/HR |
| **Other** | |
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| **Departure Checklist:** <http://www.hr.ubc.ca/faculty-staff-resources/leaving-ubc/> | |
| **Termination BP** to be completed in Workday.   * Confirm vacation balance in Workday * Includes notification to benefits and pensions | HR |
| **UBC MedIT ticket** to be submitted to address:   * email/voicemail messaging or forwarding |  |
| **University equipment** - Identify if the employee had any University equipment (i.e. laptop, monitor, cell phone, keys, etc.) that needs to be returned. |  |
| Return keys to [Parking & Access Control Office.](https://parking.ubc.ca/) |  |
| **Cancelation of UBC credit cards** – If applicable, notify Purchasing & Procurement Services to cancel UBC credit card(s). |  |
| **Cancelation of UBC cell phone account** – If applicable, contact the cell phone provider (i.e. Telus or Rogers) to discontinue or reassign cell phone account. |  |
| Location  Building / Site:  Room / Workstation:  For Supervisor:  - On-campus issued office & building keys can be returned to UBC Parking & Access Control.  - For hospital sites, please collect hospital/health authority ID cards and other access cards & keys. Contact the Facilities Manager to return.  - Please ensure all desk and cabinet/pedestal keys are returned.  - Note that assigned alarm codes will be disabled by the Facilities Manager on the employee's end date. |  |
| Leaves? |  |
| Phone Services:  Desk number;  Disconnect this phone line  Phone will be kept and please reset the VM PIN  Cancel long distance dialing code |  |
| Cell phone:  Transfer account to departing employee’s personal account  Transfer account to another employee – please provide new staff name & billing worktag below:  Cancel Account – P lease collect cell phone and contact [purchasing.coordinator@ubc.ca](mailto:purchasing.coordinator@ubc.ca) for further instructions. |  |
| Finance setup: workday access: remove access to workday  Remove as approver from the following worktags: |  |
| DIGITAL SOLUTIONS - Network resources  For the supervisor: Please ask the employee to transfer relevant files & emails and set Out-of-Office messages before leaving. University Counsel requires receiving the departing employee's consent in order to access their files & emails. If consent is not received prior to the employee's departure, then the "Request to Access Electronic Accounts and Records Form" must be completed & submitted to University Counsel.  Note for Zoom account removal, please complete & submit the following : https://ubc.ca1.qualtrics.com/jfe/form/SV\_eLLYLgIgXph7MQL  Please remove CWL access from the following resources & services :  (ie.  MS Teams, SharePoint/MedNet, FASmail shared mailboxes, etc. )  Answer only if employee is leaving UBC:  Keep employee’s FASMail active while access is disabled. Please state mailbox delete/disable date below (Max. 3 months)  Delete employees FASMail account at the end/leave dates. |  |