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  | 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 linePhone will be kept and please reset the VM PIN Cancel long distance dialing code |  |
| Cell phone: Transfer account to departing employee’s personal accountTransfer 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 for further instructions.  |  |
| Finance setup: workday access: remove access to workday Remove as approver from the following worktags:  |  |
| DIGITAL SOLUTIONS - Network resourcesFor 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. |  |