### building your UNIT’s template

This tool serves as a companion to the “Onboarding Checklist for Supervisors” and is intended to further expand the strategic and relational aspects of onboarding into their administrative and logistical components. As there are aspects of onboarding that are not one-size-fits all across campus, prompting questions and sample answers are provided to help you consider what is required to have a successful onboarding experience in your unit, so that you can create your own checklist for future hires. Feel free to adapt, expand, and customize these tools to your unit’s unique context as required.

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| **EMPLOYEE NAME:** |  |  | **ROLE:** |  |  |
| **FIRST DAY OF WORK:** |  |  |  |  |  |

### BEFORE THE EMPLOYEE ARRIVES

## Pre-Arrival Paperwork

What do you need to know or to do in order to initiate and follow-up with the onboard process in UVic Careers?

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What paperwork do you need to complete and submit and/or file before they arrive? *i.e. V# generation, NetLink ID, Payroll, Recommend for Appointment form, copies of identifications and certifications*

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## Workspace preparation

What needs to be set-up, ordered, or arranged for their workspace? *i.e. desk, chair, bench, phone, computer, business cards, mobile phone, records and files*

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What supplies and/or equipment will they need in order to be able to do their job? *i.e. office supplies, tools, stationery, uniform, lab equipment*

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## Team Communication

Who do you need to inform about the new employee? How will you let them know?

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Which directories need to be updated?

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## Get Organized

What do they need to know, to review or to prepare before their first day? *i.e. building access, parking/bus pass, dress code*

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What will their Week 1 schedule be? What do they need to accomplish?

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What materials do you need to prepare for their first week? *i.e. probation forms*

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### The first few weeks

## Workplace orientation

Which spaces in your workplace / in your unit / on the campus do you want to show them during their first day/ week?

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What information do they need to know about your unit’s facilities? *i.e. washrooms, break rooms, kitchens, personal storage, muster points / emergency contacts, recycling/composting station*

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What instructions or policies do they need to know regarding department equipment?

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## Office/Team Culture

Who do you need to introduce them to? When will you make the introductions? Do you need to reach out to anyone in advance?

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How will you introduce them to the department mission, vision, purpose and/or goals? *i.e. strategic documents, tag lines*

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What do they need to know about your workplace culture? *i.e. celebrations, favourites list, staff meetings*

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## PAPERWORK/documentation

What forms do they need to complete? *i.e. Benefit Enrolment forms, Probation forms, Cheque Distribution / Direct Deposit Form*

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What information do they need to review? i*.e. New Employee Handbook, Employee and Family Assistance Provider information, Employee Discount Program*

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What identification or badges do they need? *i.e. ONECard, Security badge*

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What authority or access do they need? *i.e. signing authority, security clearance, keys, alarm codes, C-Card, Web Leave entry system*

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## Procedural

What policies and procedures do they need to review? How will you provide these to them?

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What safety, compliance, department-specific orientations and training do they require? *i.e. Health & Safety Orientation, Awareness and Prevention of Workplace Bullying, Harassment and Discrimination, Addressing Bullying, Harassment and Discrimination Complaints (for new supervisors)*

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What unit processes do they need to be aware of? How will communicate this to them? *i.e. leaves, vacation, sick time, CTO/overtime, opening/closing procedures*

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How and when will you review their job description, set performance expectations and communicate relevant probation processes?

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## Technical

Do you need to arrange a technical orientation to phone and computer systems? How and when will this be done?

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What email signature and voicemail standards need to be communicated?

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To which systems and databases do they require access? *i.e. Banner, FAST, various calendars, Cascade, FMIS, SAS, printer mapping, unit social media*

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## UVic Community Orientation

What do they need to know about the university structure? How will you communicate this? *i.e. strategic documents, missions, goals, organizational chart*

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How will you orient them to the campus and larger UVic community? *i.e. Employee Campus Tour, New Employee Welcome, campus map*

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What university training is relevant for their role? What would enhance their professional development*? i.e. Calendars for: HR Learning, Equity and Human Rights Office, Finance, Systems*

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What newsletters should they subscribe to in order to stay up to date with relevant information and events? *i.e. Campus Checklist, Unit newsletters, the Ring, UVic in the News*

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### The first Year & Beyond

## Performance Conversations

How and when will you commence the Performance and Development Cycle? What do you need to prepare for the first conversation? *i.e. Competency Model, Performance and Development Forms*

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How will you ensure that they have access to information about professional learning and development?

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