

BEFORE EMPLOYEE ARRIVES

Employee Name: _____
Position Title: _____
Start Date: _____
Position Number: _____

	DONE
Staff Appointment: to be prepared and submitted (eRecruit or ePAF)	
Faculty Appointment: package to be prepared and sent to DVC, Provost, or HR	
Confirmation Offer Letter: Ensure signed Offer Letter received and uploaded into eRecruit/ePAF	
Payroll forms: Ensure forms have been signed by employee and forwarded to Payroll (i.e. direct deposit, both Provincial and Federal TD1s)	
New to UBC and Virtual Welcome Centre: Encourage new employees to visit www.hr.ubc.ca/faculty-staff-resources/new-to-ubc/	
Prepare Personnel file after signed letter of acceptance	
IT Onboarding: Complete IT Services on-line 'New to UBC' workflow at helpdesk.ok.ubc.ca This will take care of the following:	
Accounts Novell, email, CWL, ACM, shared folder access (K: drive), shared or delegated email access, special server access, faculty and admin online directory, global email address, global distribution lists	AUTO
Phones New or change existing, voicemail, long distance PIN, specify phone display name, clear old voice mail	AUTO
Printing and Copying Access to Printer/Colour Printing, copy PIN	AUTO
Computer New or re-allocate existing	AUTO
FMS nQuery Access: Access form with the following link: www.ubc.ca/okanagan/finance/_shared/assets/FMS_nQuery_Application_Form26692.pdf Make sure to write "Smart Forms Access only" on hard copy Scan signed FMS nQuery to Finance UBCO	
Smart Forms: Sign up for training (if applicable) Contact: financetraining.ubco@ubc.ca	
RISe/COI Access: Researcher Information Services/Conflict of Interest. Email the following information to: conflict.of.interest@ubc.ca Full name registered with UBC, UBC rank/position UBC Employee ID #, UBC telephone #, UBC email address This department will also assist in training/providing information on the filing process.	
Key and Salto card: Under Security, choose Access (Salto/Keys) helpdesk.ok.ubc.ca	
Office Space: Request Office Space (if required)	
Leave information - set up Dept spreadsheet for tracking sick and vacation leave	
Injury Illness Database (Sick Leave) reporting. Issue IT work request to add employee to appropriate on-line Injury Illness Database calendar	
Name plate order: Complete on-line Facilities request form at helpdesk.ok.ubc.ca Under Facilities, choose Enter a Work Order, Create Service Request and follow the form	
Telephone Contact List: Request update to Dept/Faculty listing (internal)	
Telephone & Info List: Request update to listing (internal)	
Dept/Faculty Distribution Lists: Update Staff/Faculty list (internal)	
Mail slot: Establish mail slot and prepare a name tag.	
Entrance Survey: The Entrance Survey should be completed by new hires within the first 6 months of joining UBC. The survey can be found in the mySurveys section of the self-service web portal www.msp.ubc.ca	

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Benefits: Ensure employee completed all benefit application forms and forwarded to Finance	
Confidentiality Agreement: Access form with the following link: K:\ADM\ER\shared\Human Resources\Forms\Employee Confidentiality Agreement.docx Employee to sign. Keep original in personnel file.	
Parking Pass Application: Employee to apply online. www.ubc.ca/okanagan/parking/apply.html	
Photo ID: Refer new employee to Card Services-Student Services (UNC 2 nd floor) to have photo ID done. Will need form and JV. www.ubc.ca/okanagan/facultystaff/_shared/assets/ubccard-conf-form25975.pdf	
Library Card: Advise new employee to take Photo ID to library circulation desk to have services activated. www.library.ubc.ca/ubco/	
SISC Access sign up: This will give access to student information and Event/room calendar (Ad Astra). Access form with the following link: www.okanagan.students.ubc.ca/facultystaff/sis.cfm?go=access	
HRMS Access: General HRMS Access Request as needed (eRecruit, ePAF, Early Employee ID Assignment, Query Reports, Position Management, Sick Leave system) Access 2 forms with the following link: www.hr.ubc.ca/forms/#hrms Employee and Dean/Head and/or Administrator must sign the forms. Scan signed PDF to Michael.Cam@ubc.ca (HR Vancouver)	
Visa Card: Access the following link for Visa Card info and application: www.purchasing.supplymanagement.ubc.ca/cardholderForm.action Obtain employee and Head/Dean's signature	
Compensation: If employee is Auxiliary, they will be paid hourly. Complete hourly timesheet according to Hourly Timesheet Cut Off Schedule on-line www.finance.ubc.ca/payroll/administrators/hiring/managing-staff/hourly-timesheet-cut-schedule New hires will need a manual timesheet completed for first pay period www.finance.ubc.ca/forms#payroll	
Office Supplies: Order office supplies as required through Staples (using on-line E-Way access)	
Business cards: Visit the UBC Strategic Sourcing website to access the XGS ordering portal and order business cards. www.supplymanagement.ubc.ca/purchasing-operations/ordering-stationery-business-cards/business-cards	
Support Staff: Advise on Essential Admin Skills Series and PD Funding	
Staff Information can be found at: web.ubc.ca/okanagan/facultystaff/welcome.html www.hr.ubc.ca/resources/forms.html#ben (Benefits sign up)	

DEPARTMENT/FACULTY BEST PRACTICES - ONBOARDING

Action/Process to be Completed	BCGEU HR Auxiliary	BCGEU Auxiliary Appt	BCGEU Ongoing	BCGEU RA/ Tech	M&P Term	M&P Ongoing	Faculty Tenure/ Tenure Track	Faculty Term (without Review)	Librarians	Research Associate	12 month Lecturer	Sessional Lecturer	Post doctoral Fellow	Adjunct Professor	Visiting Professor	Visiting Scholar
Prepare Faculty Appointment package and send to DVC, Provost, or HR	n/a	n/a	n/a	n/a	n/a	n/a	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate
Prepare and submit Staff Appointment (eRecruit or ePAF)	n/a	Administrator or designate	Administrator or designate	Administrator or Supervisor	Administrator or designate	Administrator or designate	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Ensure Offer Letter received and uploaded into eRecruit/ePAF	HR Associate	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator
Ensure Payroll forms (direct deposit, TD1s) signed and sent to Finance	HR Associate	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator
Ensure all Benefit forms have been completed and sent to Finance	n/a	Administrator (as required)	Administrator or designate	Administrator (as required)	Administrator (as required)	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator (as required)	Administrator (as required)	na/	na/	n/a
Encourage new employees to visit New to UBC and Virtual Welcome Centre	HR Associate	Administrator or designate	Administrator or designate	Administrator or Supervisor	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or Supervisor	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or Supervisor
Prepare Personnel file after signed letter of acceptance	HR Associate	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator	Administrator
Request IT Onboarding for Accounts set-up (Novell, ACM, e-mail, etc), Phones, Printing, Copying, and Computer	n/a	Administrator or designate	Administrator or designate	Administrator as required	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)
Request FMS nQuery Access (if required)	n/a	Administrator (as required)	Administrator or designate	Administrator (as required)	Administrator as required	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Sign employee up for Smart Forms training (if applicable)	n/a	Administrator (as required)	Administrator or designate	Administrator (as required)	Administrator as required	Administrator or designate	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
RISe/COI Access: Researcher Information Services/Conflict of Interest	n/a	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator as required	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate
Office Space request (if required)	n/a	n/a	Administrator or designate	Administrator (as required)	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Supervisor (as required)	n/a	Administrator (as required)	Supervisor (as required)
Key and Salto card requests	n/a	Administrator (as required)	Administrator or designate	Administrator (as required)	Administrator as required	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)	Supervisor (as required)
Set up Dept spreadsheet for tracking sick and vacation leave	HR Associate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	n/a	n/a	n/a
Issue IT Work Request to add employee to Injury Illness Database (calendar)	HR Associate	Administrator or designate	Administrator or designate	Administrator as required	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator (as required)	n/a	n/a	n/a
Request Name plate (On-line Facilities request)	n/a	n/a	Administrator or designate	Administrator (as required)	Administrator as required	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)	n/a	Administrator (as required)	Administrator (as required)
Update Staff/Faculty Distribution lists (internal)	n/a	n/a	Administrator or designate	Administrator (as required)	Administrator as required	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)
Request update to Dept/Faculty Telephone Contact list (internal)	n/a	n/a	Administrator or designate	Administrator (as required)	Administrator as required	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)
Request update to Telephone & Info List (internal)	n/a	n/a	Administrator or designate	Administrator (as required)	Administrator as required	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)
Parking Pass: Assist new hire with Parking Pass Application	n/a	Administrator (as required)	Administrator or designate	Administrator (as required)	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or Supervisor	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)
Assist new hire with obtaining Photo ID and Library Card	HR Associate (as required)	Administrator (as required)	Administrator or designate	Administrator (as required)	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or Supervisor	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)
SISC Access sign up	n/a	Administrator (as required)	Administrator or designate	n/a	Administrator (as required)	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)	n/a	n/a	n/a

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Ensure new employee signs Confidentiality Agreement	HR Associate	Administrator	Administrator or designate	Administrator	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate
Arrange for HRMS Access as needed	n/a	Administrator (as required)	Administrator or designate	n/a	Administrator (as required)	Administrator or designate	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Arrange for Visa Card if applicable	n/a	n/a	Administrator or designate	Administrator (as required)	Administrator (as required)	Administrator or designate	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Complete hourly timesheet for hourly paid employees	n/a	Administrator	n/a	Administrator (as required)	Administrator (as required)	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Order office supplies as required	n/a	Administrator (as required)	Administrator or designate	Administrator (as required)	Administrator (as required)	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)
Order Business cards if required	n/a	n/a	Administrator or designate	Administrator (as required)	Administrator (as required)	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)
Advise on Essential Admin Skills Series and PD Funding for new hire	HR Associate	Administrator (as required)	Administrator or designate	n/a	Administrator or designate	Administrator or designate	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a
Establish mail slot and prepare a name tag	n/a	Administrator (as required)	Administrator or designate	Administrator (as required)	Administrator as required	Administrator or designate	Administrator or designate	Administrator or designate	Administrator or designate	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)	Administrator (as required)
Ensure Entrance Survey completed within the first 6 months	HR Associate	Administrator (as required)	Administrator or designate	Administrator (as required)	Administrator (as required)	Administrator or designate	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a