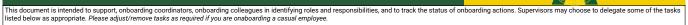
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## Supervisor Onboarding Checklist U of A Onboarding Program



THIS DOCUMENT IS VIEW ONLY. PLEASE COPY IT TO FILL IT OUT. SHARE THE COPIED VERSION WITH THE EMPLOYEE, ONBOARDING COLLEAGUE, ONBOARDING COORDINATOR, and HR PARTNER AS APPROPRIATE. Supervisors who have questions about the tasks identified on this list can reach out to the Onboarding Colleague or their HR Partner.

This template is supported by the U of A Onboarding Toolkit. The resources linked here, as well as other important onboarding tools, resources, and templates can be found in the Toolkit.

## Supervisor Responsibilities

Note: This document is best viewed in Google Sheets. Please copy the document and share with your employee as a google sheet.

If you come across any broken links or notice information that requires updating, kindly send an email to org.learning@ualberta.ca

Employee Name:	Job Title:	Supervisor's Email:	
Employee ID:	Department:	Onboarding Colleague's Email:	
Campus Computing ID (CCID):	Start Date:	Onboarding Coordinator's Email:	
Employee UAlberta Email:	End Date (if applicable):	HR Partner's Email:	

<sup>\*</sup>Data above copies over from Employee Checklist tab

Updated: A	ugust 2023		
Pre-bo	arding	Resources	Status/Notes
Objectiv	e: Complete/initiate/delegate tasks to get the employee set up to work. Prepare welcome and create 90-Day Plan.		
	Familiarize yourself with the Managing section on the Human Resources, Health, Safety and Environment (HRHSE) website:  Recruitment U of A Onboarding Program Employment, Benefits & Pay Administration Managing in a Hybrid Workplace Collective Agreement Administration Visitors to the University (Foreign, Canadian and Academic) Forms and Documentation Health and Well-being Administration Managing Performance Assessment PeopleSoft Training Time and Labour Administration	Resources for Managing Employees	
	Review the tools and resources available to you through the U of A Onboarding Program which is designed to set you up your new employee for success	Onboarding Program	
	If required: Review medical workplace accommodations information (if requested by onboarding employee)	Medical Workplace Accommodations	
	Start Employee Appointment by following the instructions on Make an Offer (appointment or extension of appointment) website [Shared Services will: Create and send the letter of offer; prompt the creation of a CCID and forward to employee upon creation; collect the SIN and immigration documentation, email benefits information]	Make an Offer	
	Identify Enterprise Applications needs and direct onboarding coordinator or authorized approver to set up: Review Administrative Information System Access and Maintenance Procedure in UAPPOL	Enterprise Applications Procedure	
	Identify relevant Google, shared drives, and department/unit listservs needs and direct onboarding coordinator to set up		
	Identify and meet with onboarding coordinator for a briefing about their role (review tasks outlined on the onboarding coordinator tab)		
	Identify and meet with onboarding colleague for a briefing about their role (review the tasks outlined on the onboarding colleague tab and consider in advance whether you have a specific focus or tasks you'd like the onboarding colleague to carry out in their role in advance of this meeting).  *This role can be modified based on the needs, expertise and capacity of the team.	Identify an Onboarding Colleague	
	Save a copy of the Onboarding Checklist and prepare it to be sent to the employee:  Ensure onboarding colleague and onboarding coordinator have been identified  Complete environmental and safety training needs assessment and develop a training plan (if required - identify and include on employee checklist tab)	HSE Training Needs Assessment	
	You have the flexibility to decide when to send the welcome email: either upon finalizing the verbal offer to keep the new employee engaged, or after the offer letter has been signed. This decision may be influenced by the timing of the completion of the offer letter from Shared Services.	Welcome Email and Conversation Template	
	Following the welcome email, host welcome call with the employee:  Ensure the employee knows to start Pre-boarding OR Your First Day section on the employee checklist tab (answer any questions they may have)	Welcome Email and Conversation. Template	
	Send announcement to department staff and other relevant colleagues		
	Send employee invites to relevant standing meetings		
	Create a 90-Day Plan for the employee and link it into their employee checklist tab [optional for casuals]	90-Day Plan Guide and Template	
	Other role specific actions or preparation as appropriate		
	Create a sense of welcome that is memorable with a small, special gesture like:  Creating a team welcome card using Kudoboard  Sending an eCard welcoming them, invite other team members to send an eCard also  Having team members write a post-it note of welcome and put them on their desk  Having the team sign a card welcoming the onboarding employee  Putting some fresh flowers or a chocolate treat/candy with a little note in their space	<u>KudoBoard</u> <u>ECard</u>	
	*Can be coordinated through the onboarding colleague if appropriate		

First Day	Resources	Status/Notes
Objective: Welcome employee, begin to orient to role, responsibilities, and working environment		
Welcome meeting with the employee to discuss:  Responsibilities related to onboarding, ensure Pre-Boarding and First Day responsibilities on the employee checklist tab are complete or on track for completion  Ensure the employee has access to the U of A Employee Orientation Course (HRHSE will automatically enroll new employees to the course upon creation of their CCID)  Role-specific skills and competencies as outlined in the position description or based on job card (if available)  Review and share: A Culture of Care Leadership Commitment  Safety and emergency information (first aid supplies, standard operating procedures, hazard assessments, reporting, emergency information - including general responses plans for building-related emergencies, unit action plans for site-specific emergencies, and important contacts such as Protective Services)  Discuss additional training required (e.g. safety - identified from the Training Needs Assessment, PeopleSoft, etc.) ensuire it is built into their Frmolivee Checklist tab.	A Culture of Care Leadership. Commitment  Environment and Safety Training  Vacation and Leaves  Time and Labour Services	

ervisor Onboarding Checklist Onboarding Program		
Security access and passwords     How to handle confidential information     Department specific standards, policies and workplace norms (timecard entries, absence reporting, work hours, breaks, overtime, telephone calls, email signatures, computer use, visitors, supplies, dress code, communication, etc)     Termination of CCID at conclusion of employment and responsibilities associated with CCID	Information and Privacy Office  CCID & Passwords	
If not already completed: Create a 90-Day Plan for the employee and link it into their employee checklist tab [optional for casuals]	90-Day Plan Guide and Template	

First W	eek	Resources	Status/Notes
Objective	e: Discuss 90-Day Plan, verify completion of onboarding actions, support a developing sense of belonging		
	Meet 1:1 with employee for first week check-in	Supervisor Milestone Conversation Guide	
	Review 90-Day Plan and address any questions with the employee (ensure it is linked on the employee checklist tab) [optional for casuals]	90-Day Plan Guide and Template	
	Request a status update on the completion of their onboarding responsibilities (outlined on the employee checklist tab)		
	Initial development planning conversation with employee (identify immediate needs to get employee going in their role—e.g. technology training)		
	Introduce performance assessment (Inform the employee of probationary period guidelines and discuss how the employee's performance will be evaluated (structure and process)	Managing Performance Assessment	

First 30	D-Days	Resources	Status/Notes		
Objective	ective: Support employee as the learn their new role. Check in regularly to ensure employee is progressing with 90-Day Plan. Facilitate employee getting to know team and relevant colleagues.				
	Meet weekly 1:1 for updates and to monitor 90-Day Plan progress [optional for casuals]	90-Day Plan Guide and Template			
	Request a status update on the completion of their onboarding responsibilities (outlined on the employee checklist tab)				
	Meet 1:1 with employee for two week check-in	Supervisor Milestone Conversation Guide			
	Meet 1:1 with employee for 30 day check-in	Supervisor Milestone Conversation Guide			
	Facilitate introductions between employee and relevant colleagues and provide context for the introduction.				
	Provide performance feedback and coaching as needed				

First 90	)-Days	Resources	Status/Notes
Objective	r: Review 90-Day Plan and discuss new goals, and engage in performance discussion		
	Meet weekly 1:1 for updates and to monitor 90-Day Plan progress [optional for casuals]	90-Day Plan Guide and Template	
	Request a status update on the completion of their onboarding responsibilities (outlined on the employee checklist tab)		
	Meet 1:1 with employee for 60 day check-in	Supervisor Milestone Conversation Guide	
	Meet 1:1 with employee for 90 day check-in	Supervisor Milestone Conversation Guide	
	Provide performance feedback and coaching as needed		

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## Onboarding Colleague Checklist U of A Onboarding Program

This is the list of responsibilities to be carried out by the Onboarding Colleague. The supervisor may delegate additional duties.

This template is supported by the U of A Onboarding Toolkit. The resources linked here, as well as other important onboarding tools, resources, and templates can be found in the Toolkit.

Onboarding Colleague Responsibilities

Note: This document is best viewed in Google Sheets

 $If you come \ across \ any \ broken \ links \ or \ notice \ information \ that \ requires \ updating, \ kindly \ send \ an \ email \ to \ org.learning@ualberta.ca$ 

Employee Name:	Job Title:		Supervisor's Email:	
Employee ID:	Department:		Onboarding Colleague's Email:	
Campus Computing ID (CCID):	Start Date:		Onboarding Coordinator's Email:	
Employee UAlberta Email:	End Date (if applicable):	_	HR Partner's Email:	

Updated: A	lugust 2023		
Pre-bo	arding	Resources	Status/Notes
Objectiv	e: Develop an understanding of how you will support the onboarding employee and prepare for welcome		
	Meet with the employee's supervisor for briefing about role and responsibilities, including:  This role can be modified based on the needs, expertise, and capacity of the team. For more information, see: Identifying an Onboarding Colleague  Discussing the expectations around your role given the context of the unit and your workload  Learning a little about the onboarding employee, their role, and ask any questions you may have about the onboarding process  Gathering information required to make initial contact  Developing a preliminary understanding of how you might support the new employee	Identify an Onboarding Colleague	
	Learn about the onboarding employee and their role from the supervisor and/or via LinkedIn		
	Plan a first day tour	First Day Tour	
	Send a welcome email to employee		
	Create a sense of welcome that is memorable with a small, special gesture like:  Creating a team welcome card using Kudobard  Sending an eCard welcoming them, invite other team members to send an eCard also  Having team members write a post-it note of welcome and put them on their desk  Having the team sign a card welcoming the onboarding employee	KudoBoard	
	Putting some fresh flowers or a chocolate treat/candy with a little note in their space     *Coordinate with the supervisor	<u>ECard</u>	

First Da	ау	Resources	Status/Notes		
Objective	Objective: Show the new employee around and help them begin to settle in				
	Set up a virtual meeting to introduce yourself and your role or stop by their workspace/office				
	Provide the employee with your university contact information				
	Share a little about a little about your role as their onboarding colleague				
	Ask the employee to think about how you can best support them				
	Conduct First Day Tour	First Day Tour			
	Invite the new employee to eat lunch with you in your local breakroom or go out for lunch/coffee				

First W	eek	Resources	Status/Notes		
Objective: Continue to develop a rapport, help the onboarding employee settle in and begin to develop a sense of belonging, and answer and/or refer emergent questions					
	1:1 meet and greet (virtual or in-person). This meeting should include:  Sharing a little about yourself and your role Explaining your role as the employee's onboarding colleague Learning about the employee's work experience, hobbies, and goals Describing the office/team culture and team norms Field questions and/or direct to campus resources				
	Introduce the onboarding employee to the rest of the unit and/or others in the building with whom they will be collaborating or interfacing (In some cases the supervisor will do this. Determine in advance who will facilitate the team introduction.)				
	Share the Employee Milestone Check-in Guide resource	Employee Milestone Conversation Guide			
	Share information on local lunch or café options				
	Explain where to get technology help, processes for ordering office supplies, using office equipment like photocopiers				
	Encourage the employee to subscribe to relevant newsletters:     Hiring and Managing (supervisors and HR staff)     Workplace Wellbeing     Any others	Hiring and Managing  Workplace Wellbeing			
	Direct employee to to the Mailman public mailing list directory to subscribe to lists of interest	<u>Mailman</u>			
	Other tasks as determined in the briefing meeting with the supervisor				
П		-			

First 30	)-Days	Resources	Status/Notes	
Objective: Help develop a sense of belonging and build confidence. Assist employee with developing an understanding of university/team culture.				
	Weekly 15-20 minute check-in meetings depending on expectations set up in briefing session			
	Other tasks as determined in the briefing meeting with the supervisor			

<sup>\*</sup>Data above copies over from Employee Checklist tab

Onboarding Colleague Checklist  U of A Onboarding Program	

First 90	)-Days	Resources	Status/Notes		
Objective	Objective: Continue to support the employee to settle into role and team, and to develop a sense of belonging				
	15-20 minute weekly check in meetings for the first 30 days and then bimonthly for the first 90-Days				
	Check in between meetings to see if the employee has questions				
	Continue to introduce the employee to others				
	Invite the employee to relevant work or social events				
	Invite for monthly lunch/coffee date				
	At the end of the period for support determined in the briefing session, discuss with the supervisor if, and how, to continue the relationship				

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## Onboarding Coordinator Checklist U of A Onboarding Program

This is the list of responsibilities to be carried out by an individual identified within the unit who completes administrative duties related to onboarding. The supervisor may delegate additional duties.

This template is supported by the <u>U of A Onboarding Toolkit</u>. The resources linked here, as well as other important onboarding tools, resources, and templates can be found in the Toolkit.

Onboarding Coordinator Responsibilities

Note: This document is best viewed in Google Sheets

If you come across any broken links or notice information that requires updating, kindly send an email to org.learning@ualberta.ca

Employee Name:	Job Title:	Supervisor's Email:	
Employee ID:	Department:	Onboarding Colleague's Email:	
Campus Computing ID (CCID):	Start Date:	Onboarding Coordinator's Email:	
Employee UAlberta Email:	End Date (if applicable):	HR Partner's Email:	

<sup>\*</sup>Data above copies over from Employee Checklist tab

Updated: A	ugust 2023		
Pre-bo	arding arding	Resources	Status/Notes
Objective	r: Provide administrative support to set up employee to work		
	Meet with the supervisor for a briefing about your role		
	Arrange access to Enterprise Applications as identified by the supervisor	Enterprise Applications	
	Add employee to relevant Google, shared drives, and department/unit listservs as identified by the supervisor		
	Arrange Desktop ID, computer set up and/or set up with necessary software, printer access and login access to network drives through New Employee IT Onboarding form	New Employee IT Onboarding	
	Arrange communication tools (e.g. office phone and/or cell phone)	Mobile/Desktop Phone Request	
	Set-up workspace and arrange computer equipment, if required	Desktop Support and Evergreening Remote Work	
	Arrange building access and/or keys (email form to: BSS.Support@ualberta.ca)	Door Access Request BSS.Support@ualberta.ca	
	Arrange for identity markers (nameplates, business cards, etc.)		
	If Applicable: Arrange lab access/keys		
	Schedule meetings for first day, week and month as identified by supervisor		
	Add employee to department directory		
	Add employee to department communication network		
	Facilitate changes to department website: add name/bio/office/phone		

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