Employee Onboarding Checklist
U of A Onboarding Program

The U of A Onboarding Program is designed with you as a guide. To support you with this role, and to ensure a smooth onboarding experience, we've created a checklist for your first 90 days.

If your supervisor has not already shared your personalized checklist with you, **make a copy of this document to use your personal Google Drive (Go to File Make a copy)** and use it as a tool to keep track of important tasks associated with your onboarding journey. As you have onboarded specific things you want to add? Take this document to meet YOUR unit specific needs (e.g. processes unique to your unit). If you have questions about anything on this list, reach out to your supervisor as your first point of contact.

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

Printing & Responsibilities

Internal Transfers: employees changing roles or departments within the university. While you're already familiar with our organizational culture, we encourage you to re-engage with it within your new role. Please review the information and resources provided below and only complete any outstanding items. If you have any questions or concerns, don't hesitate to reach out to your supervisor for assistance.

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 wp.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 Address Email		End Date (if applicable)		HR Partner's Email	

Pre-Boarding Off Your First Day

Required Documentation/Forms	Resources	Status/Notes

Your First Day

	Resources	Status/Notes

Your First Week

Meetings	Resources	Status/Notes

Your First 30 Days

	Resources	Status/Notes

First 90 Days

	Resources	Status/Notes

Additional Helpful Information

	Resources

Find or choose a Catholic school in Edmonton	Edmonton Catholic Schools
Find or choose a school in Gateway	Gateway Schools
For ongoing insurance services, AB Health Care Cards, and more. Note: AHS is partners with CAJ and ULS	Alberta Motor Association (AMA)

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Supervisor Onboarding Checklist
U of A Onboarding Program

This document is intended to support, onboarding coordinators, onboarding colleagues in identifying roles and responsibilities, and to track the status of onboarding actions. Supervisors may choose to delegate some of the tasks listed below as appropriate. *Please adjust/remove tasks as required if you are onboarding a casual employee.*

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:	

Data above copies over from Employee Checklist tab

Updated: August 2023		

Pre-boarding	**Resources**	**Status/Notes**
Objective: 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* *Can be coordinated through the onboarding colleague if appropriate*	KudoBoard ECard	
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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 response 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.), ensure it is built into their Employee Checklist tab.	A Culture of Care Leadership Commitment Environment and Safety Training Vacation and Leaves Time and Labour Services	

		Resources	Status/Notes
	etc.), ensure it is built into their Employee Checklist tab. • 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	
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First Week		Resources	Status/Notes
Objective: 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	
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First 30-Days		Resources	Status/Notes
Objective: 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		
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First 90-Days		Resources	Status/Notes
Objective: 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:	

Data above copies over from Employee Checklist tab

Updated: August 2023

Pre-boarding		Resources	Status/Notes
Objective: 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 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 *Coordinate with the supervisor*	KudoBoard ECard	
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First Day		Resources	Status/Notes
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		
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First Week		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	Mailman	
☐	Other tasks as determined in the briefing meeting with the supervisor		
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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		
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First 90-Days	Resources	Status/Notes
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 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 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:	

*Data above copies over from Employee Checklist tab

Updated: August 2023

Pre-boarding	Resources	Status/Notes
Objective: 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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