**INSTRUCTIONS FOR USE**

This customizable checklist allows you to create an orientation checklist that addresses the specific details for your unit or department. Adapt, expand and customize the checklist to your unique context so the new employee experience feels authentic to the workplace culture of your team.

Remember to refer to the [Employee Orientation Toolkit](https://www.uvic.ca/hr/assets/docs/ld/EmpOrientToolkit-FINAL.pdf) which highlights the strategic and relational aspects of new employee orientation.



To add a row to any of the tables, simply hover your cursor over the bottom left corner and click the plus button.

There are four parts in this orientation checklist. Click each link below to jump to the section you are looking for:

1. [Plan for arrival (page 2)](#_PLAN_FOR_ARRIVAL)
2. [Create a successful welcome (page 6)](#_CREATE_A_SUCCESSFUL)
3. [Plan for job success (page 9)](#_PLAN_FOR_JOB)
4. [Plan for success at UVic (page 11)](#_PLAN_FOR_SUCCESS)

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| **EMPLOYEE DETAILS** |  |
| Employee Name |   | Phone Number |  |
| Start Date |   | VNumber |  |
| Email Address |  | Netlink ID |  |

## PLAN FOR ARRIVAL

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|  **EMPLOYMENT RELATED FORMS** |
| **ITEM** | **LEAD BY** | **TIMELINE** | **X** |
| Complete the [Appointment form](https://www.uvic.ca/vpfo/accounting/services/payroll/index.php) and submit via the [Financial Services upload portal](https://www.uvic.ca/vpfo/financial-services/forms/payroll/employee/upload-document2.php) |  |  |[ ]
| If hired through UVic Careers, ensure employee has completed the UVic Employee Information Form to be assigned a V# (a V# = Employee ID number) |  |  |[ ]
| Ensure employee has [requested a Netlink ID](https://www.uvic.ca/uvicid/get/index.php) |  |  |[ ]
| Ensure employee has completed the appropriate [Benefits](https://www.uvic.ca/hr/pay-benefits/handbooks/index.php), [Pensions](https://www.uvic.ca/pensions/which-plan/index.php) and [Payroll](https://www.uvic.ca/pensions/which-plan/index.php) forms through UVic Careers:* Benefits enrollment forms (Benefits office)
* Pension enrollment forms (Pensions office)
* Direct Deposit Form (Payroll office)
 |  |  |[ ]
| Other |  |  |[ ]

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|  **JOB SPECIFIC FORMS TO COMPLETE (AS APPROPRIATE)** |
| **ITEM** | **LEAD BY** | **TIMELINE** | **X** |
| [Credit card (C Card) request form](https://www.uvic.ca/vpfo/accounting/resources/ccard/index.php) |  |  |[ ]
| [Signing authority form](https://www.uvic.ca/purchasing/staff-faculty/signing/index.php) |  |  |[ ]
| [FAST Finance access requests](https://www.uvic.ca/vpfo/accounting/forms/finaccess.php) (requires Netlink ID, V# and email address) |  |  |[ ]
| [FAST HR access request](https://www.uvic.ca/systems/services/businessapps/fasthr/index.php) (requires Netlink ID, V# and email address) |  |  |[ ]
| [FAST Web Requisitioning](https://www.uvic.ca/systems/services/businessapps/fastwebreq/index.php) (requires Netlink ID, V# and email address) |  |  |[ ]
| [Student Banner & FAST access request](http://www.uvic.ca/sar) (requires Netlink ID, V# and email address) |  |  |[ ]
|  [Banner HR access request](https://www.uvic.ca/systems/services/businessapps/bannerhr/index.php) (requires Netlink ID, V# and email address) |  |  |[ ]
| Other |  |  |[ ]

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|  **THINGS TO CONFIGURE** (Things in this section may require support from University Helpdesk) |
| **ITEM** | **LEAD BY** | **TIMELINE** | **X** |
| Request electronic document (shared drive and Connect site) access though your IT support person |  |  |[ ]
| Request building Alarm codes by emailing csecalarms@uvic.ca (requires name, Netlink ID and start date) |  |  |[ ]
| Request MS Teams access by signing up for a UVic Microsoft 365 account at [onlineservices.uvic.ca](https://onlineservices.uvic.ca/gen/f?p=260:1:661904197609:::::) |  |  |[ ]
| Add to appropriate contact and distribution lists (department directories, org charts, website contacts, email distribution lists) |  |  |[ ]
| Assign employee to [role-based emails and calendars](https://onlineservices.uvic.ca/) (requires Netlink ID) |  |  |[ ]
| Set up access to office photocopiers and printers |  |  |[ ]
| Other |  |  |[ ]

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|  **THINGS TO GATHER/PROVISION** |
| **ITEM** | **LEAD BY** | **TIMELINE** | **X** |
| [Set up work space](https://www.uvic.ca/facilities/) (workspace, chair, desk/station, nameplate, keys, lab/office supplies) |  |  |[ ]
| [Set up work technologies](https://www.uvic.ca/systems/index.php) (computer, telephone, laptop, lab/office tools and equipment) |  |  |[ ]
| Order/provision job specific equipment/tools |  |  |[ ]
| Provide required documents (manuals, books, SOPs) |  |  |[ ]
| Order/provision safety gear and uniforms |  |  |[ ]
| Other |  |  |[ ]

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|  **WAYS TO FOSTER RELATIONSHIPS** |
| **ITEM** | **LEAD BY** | **TIMELINE** | **X** |
| Create and send an introduction message to the new employee’s team and the department |  |  |[ ]
| Identify key stakeholders for introductions |  |  |[ ]
| Identify a mentor/buddy from the team |  |  |[ ]
| Add new employee to regular team meetings and events |  |  |[ ]
| Book some time to meet with new employee on their first day |  |  |[ ]
| Arrange meetings for first introductions |  |  |[ ]
| Check the [manager support](https://www.uvic.ca/hr/manager-support/index.php) website and remote work toolkit for ideas for new employee and the team in building strong, positive , respectful relationships |  |  |[ ]
| Other |  |  |[ ]

## CREATE A SUCCESSFUL WELCOME

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|  **THINGS WE CAN DO TOGETHER IN THE FIRST WEEK** |
| **ITEM** | **LEAD BY** | **TIMELINE** | **X** |
| Go to the UVic [Bookstore](http://www.uvicbookstore.ca/) and select a piece of UVic merchandise |  |  |[ ]
| Go on a department workspace tour (kitchen, washrooms, other offices, meeting rooms, personal storage, recycle and compost, lab space, tools and equipment storage, etc.) |  |  |[ ]
| Provide an onsite safety orientation including emergency procedures, emergency muster points, location of first aid kit, accident report log and local safety committee meeting minutes.  |  |  |[ ]
| Schedule any department specific safety training or orientation |  |  |[ ]
| Provide list of UVic’s [All-Gender washroom and shower facilities](https://www.uvic.ca/facilities/service/buildings/washrooms/index.php) |  |  |[ ]
| Hold a welcome gathering to meet the team and others in the lab/office/workspace |  |  |[ ]
| Review [UVic’s smudging guidelines](https://www.uvic.ca/services/indigenous/facultystaff/smudging/index.php) |  |  |[ ]
| Have a team coffee meeting |  |  |[ ]
| Go out for a walk around campus |  |  |[ ]
| Go over [team norms](https://www.uvic.ca/hr/assets/docs/working-remotely/team-norms2020.pdf) (where do we “lunch?”, call-in procedures, vacation requests, [recognition practices](https://www.uvic.ca/hr/manager-support/performance-coaching/recognition-toolkit/index.php), life celebrations, dress code, jargon and commonly used acronyms) |  |  |[ ]
| Set up regular check-in meetings for you and the employee |  |  |[ ]
| Other |  |  |[ ]

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|  **THINGS THE EMPLOYEE WILL NEED SOME TIME TO DO IN THE FIRST WEEK (AND MAY NEED HELP WITH)** |
| **ITEM** | **LEAD BY** | **TIMELINE** | **X** |
| Explore the [New Employees page](https://www.uvic.ca/faculty-staff/info-for/new-faculty-and-staff/index.php) |  |  |[ ]
| Review the [New Indigenous Employee Guide](https://www.uvic.ca/hr/assets/docs/onboarding/indigenous-employees-guide.pdf) and [New Employee Handbook](https://www.uvic.ca/hr/assets/docs/onboarding/employee-handbook.pdf) |  |  |[ ]
| Explore [UVic Online Tools](https://www.uvic.ca/hr/pay-benefits/new-employees/index.php) and the employee self-services available |  |  |[ ]
| Complete [the employee online health and safety orientation](https://www.uvic.ca/ohse/training/all-staff-faculty/index.php) and required trainings |  |  |[ ]
| Attend the annual [New Employee Welcome](https://www.uvic.ca/hr/pay-benefits/new-employees/index.php) Event (normally scheduled in January– new employees will receive an invitation from HR) |  |  |[ ]
| Purchase their [parking pass/bus pass](http://www.uvic.ca/security/parking/index.php) |  |  |[ ]
| Get their [ONECard](http://www.uvic.ca/onecard/) |  |  |[ ]
| Get their first year [free UClub membership](http://club.uvic.ca/) |  |  |[ ]
| Sign up for a [Welcome Center new employee campus tour](https://www.uvic.ca/campus/tours-and-visits/) |  |  |[ ]
| Explore [Learning Central](https://www.uvic.ca/hr/learning-development/employee-learning/index.php) and register for any required training and make a plan for learning they would like to do |  |  |[ ]
| Other |  |  |[ ]

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## PLAN FOR JOB SUCCESS

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|  **THINGS TO INCLUDE IN EQUIPMENT AND TECHNOLOGY ORIENTATIONS** |
| **ITEM** | **LEAD BY** | **TIMELINE** | **X** |
| [Use of phone, computers and workspace equipment](https://www.uvic.ca/systems/) |  |  |[ ]
| [Document and information privacy, records management and confidentiality processes](https://www.uvic.ca/vpfo/departments/privacy/training/index.php) |  |  |[ ]
| Review UVic safety protocols, working alone options, campus safewalk program and any departmental safety procedures |  |  |[ ]
| Ensure [OH&S and other mandatory training](https://www.uvic.ca/ohse/training/all-staff-faculty/index.php) is complete |  |  |[ ]
| [Systems Service catalogue](https://www.uvic.ca/systems/index.php) |  |  |[ ]
| [Systems New Employee information](https://www.uvic.ca/systems/services/new/staff.php) |  |  |[ ]
| Other |  |  |[ ]

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|  **THINGS TO HOLD CONVERSATIONS ABOUT** |
| **ITEM** | **LEAD BY** | **TIMELINE** | **X** |
| The job description (key tasks, workflow, standards and expectations, goals, priorities) |  |  |[ ]
| Workspace and/or office norms and procedures (hours of work, vacation requests, sick time protocols, office/ work coverage, email signatures, etc.) |  |  |[ ]
| Explore the “What [employees can expect](https://www.uvic.ca/hr/assets/docs/manager_support/expect-from-supervisors.pdf)” and “what [managers can expect](https://www.uvic.ca/hr/assets/docs/manager_support/expect-from-employees.pdf)” documents |  |  |[ ]
| How the role connects with other roles within the team, department and how it aligns to UVic as an organization? |  |  |[ ]
| Business and workflow processes (ticketing and service tracking tools) |  |  |[ ]
| The new employee’s position probationary process and the [Performance Development Cycle](https://www.uvic.ca/hr/manager-support/performance-coaching/development-cycle/index.php) |  |  |[ ]
| Creation of a training/learning plan and Professional Development funding (This may be dependent on the union the new employee belongs to) |  |  |[ ]
| Setting up regular check in meetings |  |  |[ ]
| The importance of [health and wellness](https://www.uvic.ca/hr/health-wellness/mental-health/index.php) and the [Employee Family Assistance Program (EFAP](https://www.uvic.ca/hr/health-wellness/employee-family-assistance/index.php)) through Telus Health |  |  |[ ]
| Set a “start up” task or assignment, that is small and achievable within the first week or two |  |  |[ ]
| Other |  |  |[ ]

## PLAN FOR SUCCESS AT UVIC

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|  **THINGS WE CAN DO TOGETHER TO ENGAGE IN THE BROADER UVIC COMMUNITY** |
| **ITEM** | **LEAD BY** | **TIMELINE** | **X** |
| Attend Campus Updates and President Town Halls together |  |  |[ ]
| Review campus communications and connect relevant items to the work of the team |  |  |[ ]
| Share [campus events](https://events.uvic.ca) and encourage attendance and volunteering |  |  |[ ]
| Encourage/support participation in collaborative efforts with other units/departments |  |  |[ ]
| Discuss respectful and inclusive workplace practices ([Territory acknowledgements](https://www.uvic.ca/services/indigenous/facultystaff/territory-acknowledgment/index.php), use of personal pronouns, introductions and meeting practices, expanded awareness of [religious observances](https://www.uvic.ca/equity/assets/docs/observances.pdf), [Indigenous Cultural Acumen Training (iCAT)](https://www.uvic.ca/services/indigenous/facultystaff/icat/index.php), and [Anti-racism](https://www.uvic.ca/equity/education/anti-racism/index.php) education programs) |  |  |[ ]
| Explore ways to build more [diverse, equitable and inclusive workplaces](https://www.uvic.ca/equity/employment-equity/index.php) through EQHR’s shared practices |  |  |[ ]
| Talk about the [Strategic Plan](https://www.uvic.ca/_assets/docs/uvicstrategicplan-approved-may2023.pdf) Key Themes and its linkages to the role and the work of the team |  |  |[ ]
| Talk about the [UVic Competency Mode](https://www.uvic.ca/hr/manager-support/performance-coaching/competency-model/index.php)l and link it to the work of the team/unit/department |  |  |[ ]
| Introduce new employee to important stakeholders from other departments and communities |  |  |[ ]
| Other |  |  |[ ]

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|  **THINGS THE EMPLOYEE CAN KNOW AND DO TO FEEL ENGAGED IN THE BROADER UVIC COMMUNITY** |
| **ITEM** | **LEAD BY** | **TIMELINE** | **X** |
| Learn UVic Acronyms related to the role, and [buildings on campus](https://www.uvic.ca/search/maps-buildings/index.php#ipn-building-directory). (The [UVic Style Guide](https://www.uvic.ca/brand/story/style/inclusivity/index.php) includes some along with ideas about [inclusive language](https://www.uvic.ca/brand/story/style/inclusivity/index.php)) |  |  |[ ]
| Access [Campus maps](https://www.uvic.ca/search/maps-buildings/index.php#ipn-maps-buildings) and visit other buildings and green spaces on campus |  |  |[ ]
| Review the [UVic Accessibility](https://www.uvic.ca/info/accessibility/index.php) website |  |  |[ ]
| Review [UVic Governance and Organizational structure](https://www.uvic.ca/about-uvic/governance-and-administration/index.php) |  |  |[ ]
| Subscribe to UVic communications media, new employee automatically received the Campus Checklist. Try these others: [The Ring](https://www.uvic.ca/news/publications/ring/index.php), [UVic in the News](https://www.uvic.ca/news/index.php),  [IACE email distributions](https://lists.uvic.ca/mailman/listinfo/iace). |  |  |[ ]
| Review key [strategic documents](https://www.uvic.ca/about-uvic/university-plans/) (Equity plan, Indigenous plan, Campus Sustainability Action Plan, etc.)  |  |  | [ ]  |
| Other |  |  |[ ]