**AHS Admin - General Associate Onboarding Checklist**

**University of Calgary – June 2022 – CSM Finance**

(web version can be found [here](https://www.ucalgary.ca/hr/training-development/onboarding/general-associate))

This document is for both the onboarding coordinator and the general associate being hired.

**Part One - After Hire is Finalized but Before Staff Starts**

To be completed by onboarding coordinator or equivalent

* The Reports to Manager and Onboarding Coordinator will need to submit a Template Based Hire for the GA with UCalgary. Be sure to search the system to see if they already exist.
* The Reports to Manager and Onboarding Coordinator will receive an email from HR with the new hire’s UCID (if they aren’t already in the system from previous contracts).
* Arrange for IT needs.
* General Associates will likely require access to the UCalgary Portal, and this can be requested once the hire is finalized.

You can verify which access they need with an email to finance@ucalgary.ca. Let them know you have to do a PSAR (PeopleSoft Access Request), advise what tasks the new hire will be doing, and they will advise which access levels to request. ***This PSAR will have to be done by the Reports to Manager from within PeopleSoft.*** You can also clone the previous position holder’s access from within the system.

Instructions for this process can be found [here](https://ucalgary.service-now.com/sys_attachment.do?sys_id=36bd3816138632008246f7b2e144b0a7).

* As part of the IT onboarding ensure your new hire is familiar with UCalgary’s [**Acceptable use of Electronic Resources and Information policy**](https://ucalgary.ca/legal-services/university-policies-procedures/acceptable-use-electronic-resources-and-information-policy)
* Additionally, if they will be accessing confidential information via electronics (most likely) they need to sign the [**Oath of Confidentiality**](https://www.ucalgary.ca/hr/sites/default/files/teams/241/oath-of-confidentiality.doc) if applicable.

If your new hire will be working remotely, please consult with IT about onboarding for this situation

* Introductory Emails
* Send an introductory email to relevant staff in your faculty and/or department
* Send a welcome email to the new hire
* Connect with Dean/Department Head/Director to ensure
* arrangements are made for appropriate office space and equipment
* access requirements are met
* the new hire has been assigned an onboarding buddy
* key meetings and training that require booking, etc have been arranged

**Part Two – After New Hire has access to laptop/workstation**

* Basic Next Steps
* Refer the new hire to [this](https://www.ucalgary.ca/hr/training-development/onboarding/seven-onboarding-essentials) onboarding website to begin their UCalgary seven essentials of onboarding before their start date
* Schedule time, place, and person for the new hire to meet on their first day
* Ensure new hire has completed the mandatory health and safety training (linked in point one above)

**Part Three – Once the New Hire has Started**

* Training (EHS, HVAT, Equity & Diversity ) (point one above)

This first half of this [webpage](https://www.ucalgary.ca/hr/training-development/onboarding/general-associate) summarizes most potential things to learn/prepare for, but we have provided a checklist here as well.

* Financial Support for PIs
* Apply for [university credit cards](https://www.ucalgary.ca/finance/university-credit-cards) if needed
* Was a PSAR submitted for required access? The following tasks will require access/training
* [**Submit Expense**](https://www.ucalgary.ca/hr/training-development/how-learning-resources/finance-admin-tasks)
* [**Purchasing**](https://www.ucalgary.ca/finance/node/103)
* [**Submit an Invoice for Payment**](https://www.ucalgary.ca/finance/submit-invoice)
* [**Paying a Non-Employee Individual**](https://ecs.ucalgary.ca/dept/hr/_layouts/15/WopiFrame2.aspx?sourcedoc=/dept/hr/Drupal%208/Training-Development/payment-request-form-individual-qrg.pdf&action=default)
* [**Finance Partners**](https://www.ucalgary.ca/finance/contacts/finance-partners)
* Research Project Support for PIs
* [**Project Access & Delegation/EFin Access**](https://www.ucalgary.ca/finance/accounting-budgeting/financial-reporting/project-creation-and-maintenance)
* [**Tri-Council and Other Funding Agencies**](https://research.ucalgary.ca/conduct-research/funding/apply-grants/external-grants/tri-council)
* [**Research Overview**](https://research.ucalgary.ca/)
* [**Research Accounting**](https://www.ucalgary.ca/finance/accounting-budgeting/research-accounting)
* [**IRISS (Animal and Human Ethic)**](https://www.ucalgary.ca/iriss/)
* [**Animal Care Ethnics Review Process**](https://research.ucalgary.ca/conduct-research/ethics-compliance/ucare-and-animal-use-protocols)

If you have any questions about this process, please connect with the Business Operations Specialists. Their contact information is on the GA Resource Page