**Academic/Clinician Onboarding Checklist**

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

(web version can be found [here](https://www.ucalgary.ca/hr/hiring-managing/onboarding/onboarding-coordinators/academic-staff))

There is a simple graphic overview of this process [here](https://www.ucalgary.ca/hr/sites/default/files/teams/241/academic-onboarding-at-a-glance2.pdf). There are additional tasks for the new hire’s reports to manager below.

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

* The reports to manager and onboarding coordinator will receive an email from HR with the new hire’s UCID.

(You can request an email address from IT if your new hire is international prior to the new hire notification - sometimes this is required by international recruits)

* Arrange for IT needs .
* If your new hire requires any IT hardware, software, or access, you should submit an [**IT onboarding form**](https://www.ucalgary.ca/hr/sites/default/files/teams/241/IT%20Onboarding%20form.docx) as early as possible as per the instructions in the link
* 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
* [You can access the IT Onboarding - New Hire Request directly here](https://ucalgary.service-now.com/it?id=it_catalog_by_category&sys_id=8272794c13af9e00b5b4df82e144b087)
* **You will also want to verify if I45 for training is required – via Resident/Fellow Program Coordinator. This is done via the PGME office.**
* 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 staff in your faculty and/or department - here is a template to help ([introductory email template](https://www.ucalgary.ca/hr/sites/default/files/teams/241/introductory-email-ACA-obc.docx))
* Send a welcome email to the new hire using this [template](https://www.ucalgary.ca/hr/sites/default/files/teams/241/sample-email-academic-obc.docx). Please note the various components based on the individual situations.
* 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
* manager checklist has been started and the new academic has been contacted to welcome them to the team after the contract was signed
* lab space is allocated and that Facilities Coordinator has contacted Environment, Health and Safety to ensure proposed lab space meets minimum health and safety requirements and is suitable for the intended purpose (e.g. research, teaching, equipment, storage, etc.). Contact Environment, Health and Safety at ucsafety@ucalgary.ca or call 403.220.6345.
* Make arrangements with Finance/HR/IT services teams if the new hire will be a key administrative contact.
* administrative support is available
* suggested meetings are scheduled to help get the new academic connected
* the new academic has a list of regular faculty meetings

**Part Two – After New Hire has completed IT/UCID set up**

Follow up if you do not receive an email from the new academic with their new account/email. You will need the IT account/email address to schedule meetings and register the new academic in training courses in advance of their arrival

* Basic Next Steps
* Refer the new academic to [this](https://www.ucalgary.ca/hr/training-development/onboarding/seven-onboarding-essentials) onboarding website to begin their seven essentials of onboarding before their start date
* If new academic has any parking inquiries, direct them to [Parking and Transportation Services](https://ucalgary.ca/ancillary/parking)
* For desktop/laptop setup and support, contact IT Support Centre
* Ensure [benefit](https://www.ucalgary.ca/hr/benefits-pension/new-employee-enrolment/academic) and [tax forms](https://ucalgary.ca/finance/payroll) have been submitted and direct deposit entered
* Schedule time, place, and person for the new academic to meet on their first day
* Ensure new academic has completed the mandatory health and safety training
* Ensure new hire is aware of resources to support wellness in our UCalgary community such as [WellBeing and WorkLife](https://www.ucalgary.ca/hr/wellness/wellbeing-worklife), [the Campus Mental Health Strategy](https://www.ucalgary.ca/mentalhealth) and many [others](https://www.ucalgary.ca/hr/wellness/wellbeing-worklife/resources).

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

* Training (EHS, HVAT, Equity & Diversity )
* Research Profile Set Up Assistance
* Learn more about [project setup](https://www.ucalgary.ca/finance/faculty-and-researchers/project-set-up)
* Complete the [start-up funds checklist](https://www.ucalgary.ca/research/files/research/start-up-funds-checklist-revised-aug-2017.pdf)
* [IRISS registration](https://www.ucalgary.ca/iriss/)
* Ensure new academic’s research profile is posted on the faculty website.
* For help transferring existing grants, contact [Research Services](https://research.ucalgary.ca/research/contact).
* Prepare for teaching
* [Teaching Development training](https://taylorinstitute.ucalgary.ca/faculty)
* For graduate student supervision, see faculty’s grad program administrator
* Review finances
* Apply for [university credit cards](https://www.ucalgary.ca/finance/university-credit-cards)
* Does the Clinician need to be set up as a Supplier for PGME ? (ie, they will be doing resident/fellow training and need to bill for their time)
* For funding opportunities, email rsogrants@ucalgary.ca.
* Administrative Preparation
* Request building/office/lab access

Arrange for keys/swipe access by contacting your area’s access administrator. New hire must obtain their Unicard when they start from the Unicard office for the swipe access to be provisioned.

* Update UCalgary contacts directory and faculty/unit distribution lists

Contact the [department administrator](http://contacts.ucalgary.ca/coordinators) for assistance

* Grant D2L access

The student administrator in your faculty must set up the new academic as “instructor of record in the student system and then the new academic can setup course material, etc. in D2L.

* Determine if SecurID is required (if applicable)

[See whether access requires a SecurID.](https://www.ucalgary.ca/hr/hiring-managing/onboarding/security-roles) Contact IT Support Centre

* Print business cards (if applicable)

Contact the [Print Shop](https://www.ucalgary.ca/printshop/) on campus