ORIENTATION CHECKLIST FOR RESEARCHERS
SUPERVISING POSTDOCTORAL FELLOWS (EMPLOYEES)

“A simple and effective onboarding for a positive employee-experience”

Employee’s name: __________________________________________________________

Faculty’s or service’s name: ________________________________________________

Department’s or sector’s name: _____________________________________________

Position title: ____________________________________________________________

Supervising Researcher’s name: ____________________________________________

Date of hire: ____________________ Today’s date: ____________________________

BEFORE THE START DATE

You can submit requests for a workspace, a telephone, a computer and accounts as soon as you have the employee number. Delays can arise. As a result, we suggest you submit your requests as soon as you can.

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<tr>
<th>Task</th>
<th>Accomplishment date</th>
<th>Initials</th>
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<tbody>
<tr>
<td>Determine computer needs</td>
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<td>Investigate space requirements and make arrangements for workspace.</td>
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<td>Contact Facilities as needed. For immediate attention, call 613-562-5800 ext. 2222.</td>
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<td>Once a workspace is identified, contact Information Technology or the responsible person within your faculty or department to obtain a phone or computer. Make sure they are installed and working. For immediate attention, call 613-562-5800 ext. 6555.</td>
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<td>Contact Information Technology or the responsible person within your faculty or department to arrange for software installation and set up all necessary accounts (Office 365 and more).</td>
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<td>Ask the employee to register for mandatory training sessions, including &quot;WHMIS&quot;. The employee must consult the list of required courses and register.</td>
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<td>Obtain business cards (as per internal practices of the faculty).</td>
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<td>Contact the responsible person within your faculty or department to update phone lists, University directory, schedules, org. chart, departmental e-mail lists, etc.</td>
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<td>Introduce new employee by e-mail (name, title, start date). Copy the new employee.</td>
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<td>Ensure the (immediate) team is aware of the start date for the new employee and everyone has some time in the first week to meet the new hire.</td>
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<td>Ensure a personal call is made prior to the new employee’s first day to welcome the employee, explain where the person should go on the first day and that you will be taking the employee out for lunch on the first day (if appropriate) and verify if the employee has accommodation needs.</td>
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<td>Coordinate a meaningful first work assignment.</td>
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The first day and first few weeks

1. Did the supervising researcher complete all the required information on the hiring form? □ □ □

2. Did the employee complete all the hiring forms? (benefits, pension plan, etc.)? □ □ □

3. Was the employee directed or advised to go online for information about his/her benefit entitlements? □ □ □

4. Has the employee been advised and did the employee visit the online orientation e-guide and review all pertinent information? □ □ □

5. Did the supervising researcher or "buddy" give the employee a tour of your sector/department and introduce the employee to co-workers? □ □ □

6. Did the supervising researcher assign a peer to work with the employee during the first week? □ □ □

7. Did the employee receive clear information on:
   - Salary and benefits? □ □ □
   - Pay periods? □ □ □
   - Annual leave? □ □ □
   - Accommodation? □ □ □
   - Probationary period? □ □ □
   - Working hours? □ □ □
   - Building facilities (washroom, food services, etc.)? □ □ □
   - Information technology systems? □ □ □
   - Mandatory training workshops □ □ □

8. Did the supervising researcher or “buddy”:
   - Discuss pertinent institutional or departmental policies and other information? □ □ □
   - Arrange for the employee to tour the campus and the employee’s faculty or service? □ □ □
   - Introduce the employee to other staff and clients (where applicable)? □ □ □
   - Regularly encourage questions and answer any the employee had? □ □ □
   - Tell the employee that they will follow up periodically to answer any further questions □ □ □

9. Did the supervising researcher:
   a) Carry out all the necessary logistical preparations and at the appropriate time;
      - computer hardware, software and passwords? □ □ □
      - phones(s)? □ □ □
      - key(s)? □ □ □
      - other (where applicable)? □ □ □
   b) Discuss assigned projects and training plans? □ □ □
   c) Discuss the performance appraisal process? □ □ □

10. Has the supervising researcher set up one or two meetings for a pulse check to see how things are going at the end of weeks 1, 2 and 3? □ □ □