



THE UNIVERSITY OF BRITISH COLUMBIA

AVP Finance and Operations

Okanagan Campus

# Workday Wednesday: Onboarding New Employees

September 22<sup>nd</sup>, 2021





# RESOURCES AVAILABLE

## Onboarding in Workday Knowledge Base Article

- [https://ubc.service-now.com/selfservice?id=kb\\_article&sys\\_id=7f92240c1bdef410ba8f539f034bcb84&table=kb\\_knowledge](https://ubc.service-now.com/selfservice?id=kb_article&sys_id=7f92240c1bdef410ba8f539f034bcb84&table=kb_knowledge)

## Onboarding Setup (Admins) Knowledge Base Article

- [https://ubc.service-now.com/selfservice?id=kb\\_article&sys\\_id=08aec2a91bc1749045ad766f034bcb6f&table=kb\\_knowledge](https://ubc.service-now.com/selfservice?id=kb_article&sys_id=08aec2a91bc1749045ad766f034bcb6f&table=kb_knowledge)

## Onboarding Reports Knowledge Base Article

- [https://ubc.service-now.com/selfservice?id=kb\\_article&sys\\_id=f84c0dd41bf2b0101cfdeac3b24bcb12&table=kb\\_knowledge](https://ubc.service-now.com/selfservice?id=kb_article&sys_id=f84c0dd41bf2b0101cfdeac3b24bcb12&table=kb_knowledge)

## Required Onboarding and Job-Specific Training

- [https://ubc.service-now.com/selfservice?id=kb\\_article&sys\\_id=f139f92b1b25b01027278556cc4bcb92&table=kb\\_knowledge](https://ubc.service-now.com/selfservice?id=kb_article&sys_id=f139f92b1b25b01027278556cc4bcb92&table=kb_knowledge)

## UBCO Employee IT Onboarding Form

- [https://ubc.service-now.com/selfservice?id=sc\\_cat\\_item\\_guide&sys\\_id=3b25cc431b83d010c7b02069bc4bcb10](https://ubc.service-now.com/selfservice?id=sc_cat_item_guide&sys_id=3b25cc431b83d010c7b02069bc4bcb10)

# AGENDA

- 1 | Setting up Onboarding (Admins)
- 2 | Onboarding in Workday (New Employees)
- 3 | Q+A





# ONBOARDING SETUP



**IMPORTANT TO KNOW  
BEFORE YOU START**

# IMPORTANT TO KNOW



The Onboarding Setup is the final step of the hiring process. After the Hire is complete, the initiator will receive a Workday Inbox item to complete the Onboarding Setup.

To minimize delays, Workday will automatically complete the Onboarding Setup task **five days** after the Hire has been fully completed.

The Onboarding Setup **must be submitted** in order to enable the new hire to begin the Onboarding process. Delay or failure to submit the Onboarding Setup may delay the employee from completing their onboarding tasks, including receiving pay through direct deposit.

The initiator is strongly encouraged to manually submit the Onboarding Setup within the five-day window following the Hire, in order to provide details specific to the employee's new department. However, if the initiator doesn't customize and submit the Onboarding Setup task within the five-day window, the employee will receive the Onboarding tasks with the standard Welcome and People to Meet messages.

# ONBOARDING SETUP

The screenshot shows a Workday Inbox interface. The top bar is blue with the word 'Inbox' in white. Below the bar, there are tabs for 'Actions (42)' and 'Archive'. The 'Actions (42)' tab is selected. Below the tabs, there are filters for 'Viewing: All' and 'Sort By: Newest'. The main content area is titled 'Onboarding Setup' and contains a message: 'Welcome to UBC! We are very happy to have you join our team. Take some time to familiarize yourself with the information contained within this orientations page and we will connect soon!'. Below the message, there is a list of items. The first item is 'Onboarding Setup for Hire: [redacted] Non Union Salaried - Research Assistant /Technician 5 on 23-Apr-2020 21 day(s) ago - Due 2020-04-26; Effective 2020-04-23'. This item is highlighted with a red box. A teal callout bubble with the text 'Click on Action Item' points to the item. Below the first item, there is another item: 'Assign Role(s) to Position: Create Position: Medical Genetics Advisor 22 day(s) ago - Due 2020-04-24; Effective 2020-04-01'. To the right of the items, there is a 'Select People' dropdown menu and a 'Notify' checkbox.

**Inbox**

Actions (42) Archive

Viewing: All Sort By: Newest

**Onboarding Setup**

Message: Welcome to UBC! We are very happy to have you join our team. Take some time to familiarize yourself with the information contained within this orientations page and we will connect soon!

**Onboarding Setup for Hire:** [redacted] Non Union Salaried - Research Assistant /Technician 5 on 23-Apr-2020 21 day(s) ago - Due 2020-04-26; Effective 2020-04-23

**Assign Role(s) to Position: Create Position:** Medical Genetics Advisor 22 day(s) ago - Due 2020-04-24; Effective 2020-04-01

Select People: [dropdown menu]

Notify: [checkbox]

**Click on Action Item**

Once the Hire process is complete, the initiator will receive a Workday Inbox item to complete Onboarding Setup.

# ONBOARDING SETUP

Select the names of contacts the new hire should meet with upon starting in their new position. Tick the 'Notify' box to send a notification to the people entered in this field.

This field auto-populates and is an editable field. Creating a customized message is encouraged.

Select the names of helpful contacts (either internal or external to the dept) the new hire should contact upon starting in their new position.

Select Helpful Contacts. Check the notify box and Enter Notification Subject and Notification Message

Click Submit to complete the Onboarding Setup

## Onboarding Setup

1 minute(s) ago - Due 2020-01-15; Effective 2020-01-10

Please use the from my contacts for X and helpful contacts for Y.

**Message** Welcome to UBC! We are very happy to have you join our team. Take some time to familiarize yourself with the information contained within this orientations page and we will connect soon!

### People to Meet

Select People

X

...

:

X

...

:

X

...

:

Select People to Meet

Notify ☐

### Helpful Contacts

Select People

X

...

:

Notify ☒

Notification Subject \*

Notification Header \*

Notification Message \*

enter your comment

### Process History

Click Submit

Submit

Save for Later

Cancel



# ONBOARDING SETUP

Once the Onboarding Setup is completed, the new hire's onboarding page will be activated and viewable in Workday. Onboarding tasks will appear in the new hire's inbox with a due date for completion. Not all onboarding tasks will appear at once. Tasks are sequential; as the new hire completes certain tasks, it will trigger the system to add the next task that is required to move through the Onboarding process.



# ONBOARDING IN WORKDAY



**IMPORTANT TO KNOW  
BEFORE YOU START**

# IMPORTANT TO KNOW



Onboarding is **required** for all newly hired or re-hired employees

Onboarding is **not required** when an **existing employee changes their job** or **starts an additional job**

Complete **ALL** onboarding tasks as soon as possible. Failing to complete all tasks may result in delay in pay and tax slip issues.

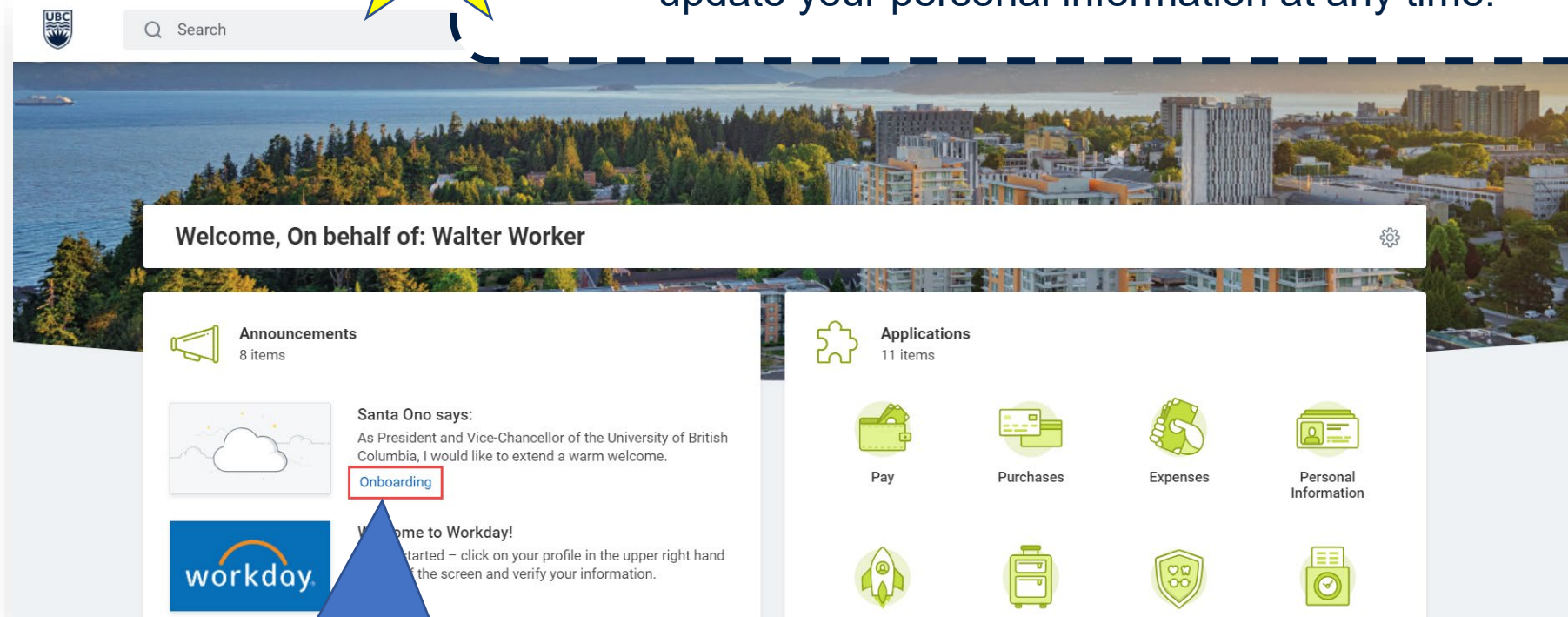
New hires must activate their CWL before logging into Workday. Student employees need to contact UBCO IT to have their CWL linked to their employee ID.



# ONBOARDING IN WORKDAY



**DO NOT CHANGE** Contact/Banking Information **before** completing Onboarding! Once onboarding is complete, you can update your personal information at any time.



From the Workday homepage, locate the Onboarding link within the welcome announcement from Santa Ono.

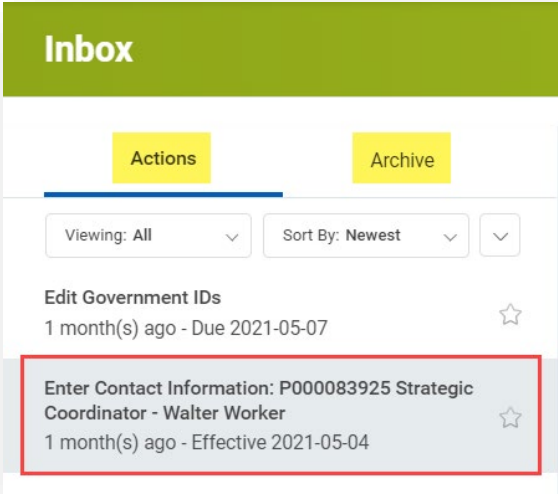
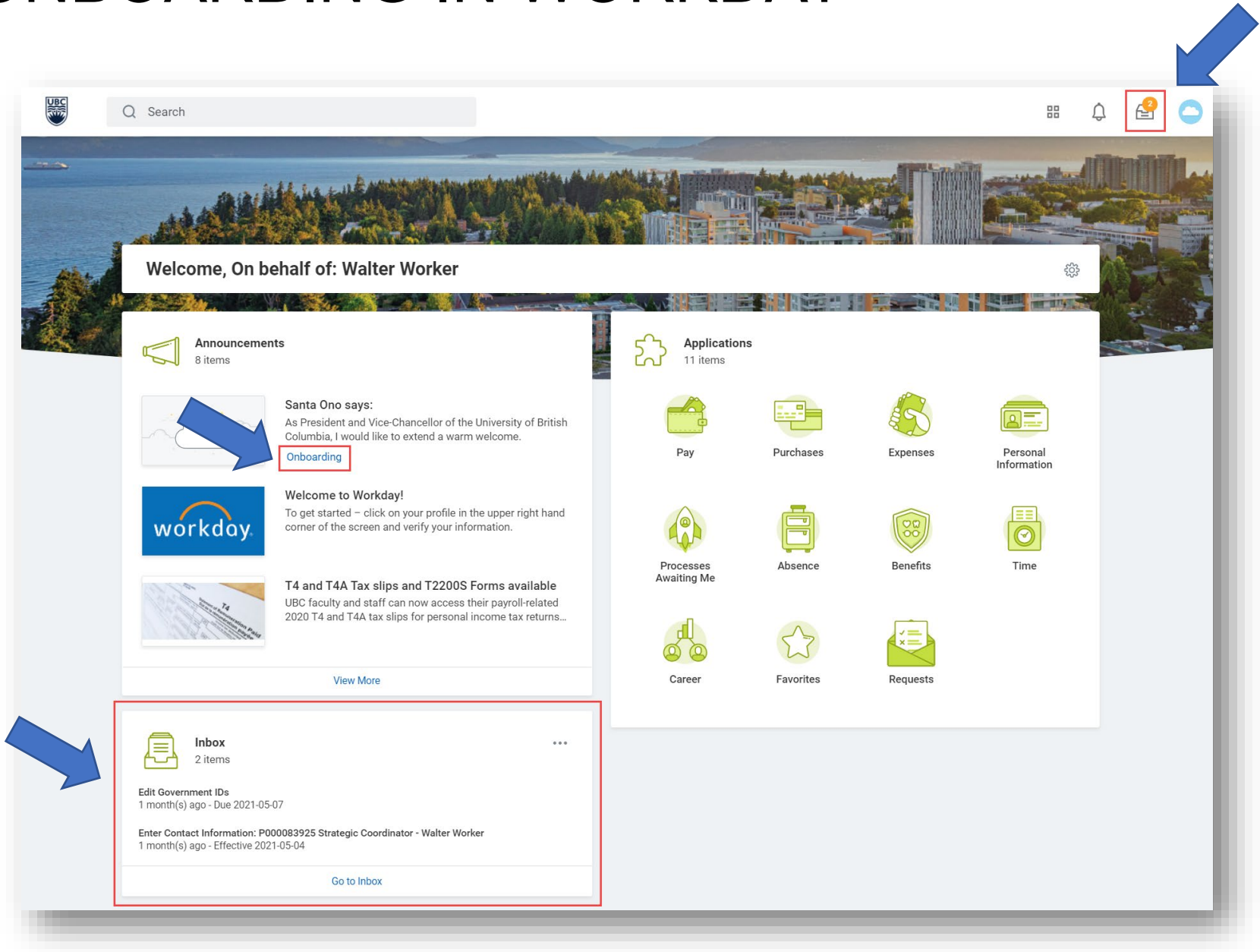
# ONBOARDING IN WORKDAY

The screenshot displays the Workday Onboarding interface with the following sections and callouts:

- Onboarding Header:** A green bar at the top with a back arrow and the word "Onboarding".
- Message from Manager (3):** A blue callout bubble pointing to a message from Marcia Buehler, stating: "Welcome message from your Manager and a list of suggested people to meet".
- Message from President (2):** A blue callout bubble pointing to a message from Santa Ono, stating: "Helpful contacts as identified by your Manager".
- Getting Started (1):** A blue callout bubble pointing to a progress indicator showing 0% completed and 2 ready, stating: "Displays a summary status of your onboarding tasks".
- From My Manager (4):** A blue callout bubble pointing to a message from the manager, stating: "Welcome to UBC! We are very happy to have you join our team. Take some time to familiarize yourself with the information...".
- Helpful Contacts (6):** A blue callout bubble pointing to a list of contacts, including an HR Functional Analyst.
- People to Meet:** A section showing a list of people to meet, including an HR Product Manager.
- Helpful Campus Contacts (5):** A blue callout bubble pointing to a list of campus contacts, including UBC Parking, UBC Card, UBC Payroll, and UBC United Way.
- New Hire News! (7):** A blue callout bubble pointing to a list of news items, including Welcome to UBC, UBC Statement on Respectful Environment, Virtual Campus Tour, Indigenous Programs, Equity & Inclusion Office, and Wayfinding!.

The interface also features a central progress indicator showing 0% completed and 2 ready, and a "Go to Inbox" button.

# ONBOARDING IN WORKDAY



Onboarding tasks are located in your Workday Inbox. Your Inbox displays the tasks that require your action.

# ONBOARDING IN WORKDAY

All employees will receive the **Enter Contact Information** task. Review your contact information and add or correct as needed.

**Note:** Your personal contact information, specifically address, is critical to many processes related to your employment and pay. Ensure that your contact information is entered correctly during onboarding, and remember to update it as needed during your time working at UBC, so there is no disruption in receiving your pay.



**Critical Reminder:** You must complete these tasks in order to receive your pay:

Contact Information  
Payment Election Enrollment Event  
Province Withholding Elections  
Federal Withholding Elections



# ONBOARDING IN WORKDAY

## Enter Contact Information

Onboarding for Walter Worker



1 month(s) ago - Effective 2021-05-04

### Home Contact Information

#### Primary Address

Address

123 Ash Street, BC V1V 1V7

To make an edit,  
click on the pencil  
icon.



#### Note on Editing Icons:

- X: **Delete** the current data in the field.
- Pencil: **Open** the field for editing.
- Left-pointing arrow: **Undo** most recent action in the field.
- Check mark: **Save** changes to the field.



## Inbox

Actions

Archive

Viewing: All

Sort By: Newest

You have new inbox items.

Refresh

Once all information is entered and corrected, click the **Submit** button at the bottom of the task. A **Refresh** button may appear as you complete tasks. Click on it to update the items in your Workday Inbox.


**Note:** During Onboarding, the To Do steps are typically something that must be completed outside of Workday, such as training. Once you complete the To Do item, return to Workday and click Submit on the task to mark it as complete.

# NEXT STEPS

Q

my UBC workday training

X



My UBC Workday Training Report

The My UBC Workday Training report shows your recommended courses

My UBC Workday Training

Report Business Owner:

8 items

Turn on the new tables view

X

PDF

Table icons

Recommended Course	Description
<a href="#">Training: Workday Basics</a>	UBC Faculty, Staff and Student Employees will learn the basic functionality of Workday, including navigating the Home Page, Inbox and more!
<a href="#">Training: Workday Essentials for Salaried Staff</a>	UBC Salaried Staff will get an introduction to Workday for Staff HR tasks, and learn about Onboarding, Absences and Benefits.
<a href="#">Training: Workday Finance Foundations</a>	UBC Faculty, Staff and Student Employees will learn about Finance key concepts including Workday's Foundation Data Model and terms such as Worktags and Cost Centres.
<a href="#">Training: Workday Expense Reporting</a>	UBC Faculty, Staff and Student Employees will learn about Travel and Expense management including how to claim expenses.
<a href="#">Training: Workday Cash Sale for Cash/Cheque Deposit and Internal Service Delivery</a>	UBC Faculty and Staff will learn how to record cash sales, request internal service providers and more!
<a href="#">Training: Workday Procurement, Receiving and Supplier Invoices</a>	UBC Faculty, Staff and Student Employees will learn about advanced Finance topics including purchase requisitions, supplier accounts and more.
<a href="#">Training: Workday Reporting</a>	UBC Faculty, Staff and Student Employees will learn the functionality of Workday reporting and access list of frequently used reports.
<a href="#">Training: UBC Workplace Learning Dashboard</a>	View your In Progress and Completed WPL courses. Track completed training records and any expiry dates.

Click on the course title to open the course enrollment page on the Workplace Learning website

All staff must complete Workday training courses that are determined by their employment type (e.g. Hourly/Salaried, Staff/Faculty/Student) and Security Role (e.g. HR Partner/Analyst, Manager, Payroll Representative, etc.).

Note: Refer to the [Required Onboarding and Job-Specific Training article](#) for more information on these courses.



**Next Workday Wednesday:** September 29<sup>th</sup>, 10:00 –  
11:00am

**Topic:** HR + Finance FAQs

[Registration link](#)



# APPENDIX





The onboarding steps are listed below along with the condition rule of when an employee would receive that step. Also in onboarding, the **To Do** steps are typically something that has to be completed outside of Workday, but the employee must click Submit on the task in Workday to mark it as complete. All other steps are completed directly in Workday.

Steps with the same letter kick off at the same time and have to be completed before the next set of steps show up. **All onboarding steps** have to be completed for the information to be saved in Workday.

- A. Enter Contact Information
  - i. All employees
- A. Enter Personal Information
  - i. All employees
- A. Edit Government IDs
  - i. Conditional step sent to those that are not currently enrolled in health benefits, the Provincial Health Number is empty, the Job Family or Job Family Group is NOT contingent worker, student, and FTE is greater than or equal to 0.5, and the end employment date minus hire date on worker is greater than 3 months or end employment date is blank.
- B. To Do: Add Education
  - i. Step only sent to those in the Academic Job Family.
  - ii. Instructional Text: Please use the task below to add your Education.
- B. Change Emergency Contacts
  - i. All employees
- B. Complete Federal Withholding Elections
  - i. Sent to employees with Primary job located in Canada, and NOT unpaid faculty.
- B. Complete Province Tax Elections
  - i. Sent to employees with Primary job located in Canada, and NOT unpaid faculty.

- B. Manage Payment Elections
  - i. All employees, but NOT unpaid faculty.
- C. Change Benefit Elections
  - i. Only sent to employees eligible for benefits based on their employment group and appointment details.
- D. Change My Photo
  - i. All employees
- D. To Do: Enroll in BCGEU Okanagan Membership
  - i. Only sent to BCGEU Okanagan Support Staff and BCGEU Okanagan Students
  - ii. Instructional Text:  
Welcome the University of British Columbia’s Okanagan campus! With a workforce of over 16,000 individuals, UBC is organized into a number of staff and faculty employee groups.  
Your employment requires membership in the B.C. Government and Service Employees’ Union (BCGEU).  
Please fill out the applicable BCGEU Membership Application form below:  
For regular, ongoing positions use this form: <https://hr.ok.ubc.ca/wp-content/uploads/sites/71/2020/03/BCGEU-Membership-Application-Card-Reg.pdf>  
For auxiliary or term positions with an end date (including student positions), use this form: <https://hr.ok.ubc.ca/wp-content/uploads/sites/71/2020/03/BCGEU-Membership-Application-Card-Temp-Aux.pdf>

**Instructions:**  
Complete this online form, then print and sign.  
Send the original copy to your Faculty or Department Assistant/Administrator.  
**Note:** Form with applicant’s original signature and email address is required (scanned, copied or faxed forms are not accepted).



## D. Complete Employment Equity & Inclusion Survey

i. All UBC employees

## D. To Do: Safety Supervision at UBC

i. All UBC employees that have the Manager security role

ii. Instructional Text:

Welcome to UBC!

As you get established in your new role, there are some short courses that all new University employees – faculty, staff, and student employees – are required to complete. These courses are designed to help support the health, safety and wellbeing of all people at the University. Part of UBC's commitment to our community is to ensure this training is completed in a timely manner.

**Safety Supervision at UBC** must be completed within **14 days of your start date**.

To begin, UBCV employees please enroll at <https://wpl.ubc.ca/browse/srs/mandatory/courses/wpl-srs-supert>. UBCO employees please enroll at <https://wpl.ubc.ca/browse/ubcohse/courses/wpl-hse-ssu>.

The course requires an estimated 45-60 minutes to complete.

Regards,

Marcia Buchholz

Vice-President, Human Resources



## D. To Do: Privacy & Information Security – Fundamentals Part 1

i. Sent to employees if this training is designated as required on their job profile.

ii. Instructional Text:

Welcome to UBC!

As you get established in your new role, there are some short courses that all new University employees – faculty, staff, and student employees – are required to complete. These courses are designed to help support the health, safety and wellbeing of all people at the University. Part of UBC's commitment to our community is to ensure this training is completed in a timely manner.

**Privacy & Information Security - Fundamentals Part 1** must be completed within **14 days of your start date**.

To begin, please enroll at . <https://wpl.ubc.ca/browse/prism/courses/wpl-srs-prsecf>.

The course requires an estimated 20-30 minutes to complete.

Regards,

Marcia Buchholz

Vice-President, Human Resources



## D. To Do: Privacy & Information Security – Fundamentals Part 2

i. Sent to employees if this training is designated as required on their job profile.

ii. Instructional Text:

Welcome to UBC!

As you get established in your new role, there are some short courses that all new University employees – faculty, staff, and student employees – are required to complete. These courses are designed to help support the health, safety and wellbeing of all people at the University. Part of UBC's commitment to our community is to ensure this training is completed in a timely manner.

**Privacy & Information Security - Fundamentals Part 2** must be completed within **28 days of your start date**.

To begin, please enroll at <https://wpl.ubc.ca/browse/prism/courses/wpl-srs-prsec2>.

The course requires an estimated 20-30 minutes to complete.

Regards,

Marcia Buchholz

Vice-President, Human Resources





#### D. To Do: Workplace Violence Prevention Training

i. Sent to employees if this training is designated as required on their job profile.

ii. Instructional Text:

Welcome to UBC!

As you get established in your new role, there are some short courses that all new University employees – faculty, staff, and student employees – are required to complete. These courses are designed to help support the health, safety and wellbeing of all people at the University. Part of UBC's commitment to our community is to ensure this training is completed in a timely manner.

**Workplace Violence Prevention Training** must be completed within **14 days of your start date**.

To begin, UBCV employees please enroll at <https://wpl.ubc.ca/browse/srs/mandatory/courses/wpl-srs-wpvptr>. UBCO employees please enroll at <https://wpl.ubc.ca/browse/ubcohse/courses/wpl-srs-wpvptr>.

The course requires an estimated 20-25 minutes to complete.

Regards,

Marcia Buchholz

Vice-President, Human Resources



## D: To Do: New Worker Safety Orientation

Sent to employees if this training is designated as required on their job profile.

Instructional Text:

Welcome to UBC!

As you get established in your new role, there are some short courses that all new University employees – faculty, staff, and student employees – are required to complete. These courses are designed to help support the health, safety and wellbeing of all people at the University. Part of UBC's commitment to our community is to ensure this training is completed in a timely manner.

**New Worker Safety Orientation** must be completed within **3 days of your start date**.

To begin, UBCV employees please enroll at <https://wpl.ubc.ca/browse/srs/mandatory/courses/wpl-srs-newsot>. UBCO employees please enroll at <https://wpl.ubc.ca/browse/ubcohse/courses/wpl-srs-newsot>.

The course requires an estimated 20-30 minutes to complete.

Regards,

Marcia Buchholz

Vice-President, Human Resources



## D: To Do: Preventing and Addressing Workplace Bullying and Harassment Training

Sent to employees if this training is designated as required on their job profile.

Instructional Text:

Welcome to UBC!

As you get established in your new role, there are some short courses that all new University employees – faculty, staff, and student employees – are required to complete. These courses are designed to help support the health, safety and wellbeing of all people at the University. Part of UBC's commitment to our community is to ensure this training is completed in a timely manner.

**Preventing and Addressing Bullying and Harassment** must be completed within **14 days of your start date**.

To begin, UBCV employees please enroll at <https://wpl.ubc.ca/browse/srs/mandatory/courses/wpl-srs-bulhar>. UBCO employees please enroll at <https://wpl.ubc.ca/browse/ubcohse/courses/wpl-srs-bulhar>

The course requires an estimated 20-25 minutes to complete.

Regards,

Marcia Buchholz

Vice-President, Human Resources



## D. To Do: Preventing COVID-19 Infection in the Workplace

i. Sent to employees if this training is designated as required on their job profile.

ii. Instructional Text:

Welcome to UBC!

As you get established in your new role, there are some short courses that all new University employees – faculty, staff, and student employees – are required to complete. These courses are designed to help support the health, safety and wellbeing of all people at the University. Part of UBC's commitment to our community is to ensure this training is completed in a timely manner.

**Preventing COVID-19 Infection in the Workplace** must be completed within **3 days of your start date**.

To begin, UBCV employees please enroll at <https://wpl.ubc.ca/browse/srs/courses/wpl-srs-covid>. UBCO employees please enroll at <https://wpl.ubc.ca/browse/ubcohse/courses/covid-19>

The course requires an estimated 30-45 minutes to complete.

Regards,

Marcia Buchholz

Vice-President, Human Resources



**After 30 Days:**

Complete Recruiting Experience Survey

Sent to UBC employees hired through recruitment, NOT a contingent worker, NOT unpaid faculty

Complete 30-Day Entrance Survey

Sent UBC to employees, but NOT a contingent worker, NOT unpaid faculty

**Reports**

Managers do not receive a reminder if their new hires have outstanding tasks to complete. They can run a variety of reports to see the onboarding status of their hires:

Onboarding Status Summary

Completion of UBC General Required Training for Onboarding

Employees Completed Onboarding Tasks by Sup Org

Employees Completed Onboarding Tasks by VP/Faculty

UBC New Worker Training Onboarding – 10 days past due).

Access to these reports is controlled by the Security Role that someone has.

