***EXAMPLE* INDUCTION CHECKLIST**

**This induction checklist is a guide for managers and those responsible for the induction of new staff, to ensure all the necessary information is provided to enable them to settle into their new role as quickly and as smoothly as possible. The checklist has been broken down into stages so that the Starter receives a gradual flow of information during their induction period.**

**Managers and those responsible for the induction must ensure that the new starter fully understands the information provided and that the checklist is signed by both parties. Once completed, a copy of this checklist should be saved to their personal file.**

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| --- | --- | --- | --- | --- | --- |
| **Name:** |  | **Employee Number:** |  | | |
| **Position:** |  | **Start Date:** |  | | |
| **Team:** |  | **Line Manager’s Name:** |  | | |
| **Service:** |  | **Service Manager’s Name:** |  | | |
| **As soon as possible:** | | | **Manager**  **Signature** | **Employee Signature** | **Date** |
| Set up network accounts, email, internet, SharePoint/shared drives etc access via IT department in advance of the first day | | |  |  |  |
| Set up/request access to payroll, annual leave, and other accounts/sites | | |  |  |  |
| Carry out/arrange Occupational Health Report/Certificate of Fitness to work  Familiarise yourself with any reasonable adjustments required and order any additional equipment need for the workspace | | |  |  |  |
| Send welcome letter or email (where and when to report, who to report to, where to park etc.)  Either separately, or in the letter/email, check if the new starter has any individual needs such as religious or cultural beliefs. Should there be, where possible, make arrangements to support these | | |  |  |  |
| Allocate and arrange appropriate accommodation/workspace as required | | |  |  |  |
| Arrange uniform/personal protective equipment (if applicable) | | |  |  |  |
| Arrange appropriate office equipment/furniture/stationery etc. | | |  |  |  |
| Request ID Card and access to relevant buildings and arrange photograph | | |  |  |  |
| Notify colleagues of new starter, their job and their start date | | |  |  |  |
| Identify volunteer to act as buddy | | |  |  |  |
| Create a simple programme of work based on the job profile | | |  |  |  |
| Arrange for them to meet key people, where appropriate | | |  |  |  |
| **Day one (where applicable)** | | | **Manager**  **Signature** | **Employee**  **Signature** | **Date** |
| Greet new starter on arrival/virtually | | |  |  |  |
| Introduce new starter to team and buddy | | |  |  |  |
| Introduce new starter to workspace/work area | | |  |  |  |
| Undertake tour of work location | | |  |  |  |
| Show location of toilets, kitchen, refreshment facilities and break out areas | | |  |  |  |
| Explain arrangements for tea/coffee and refreshment facilities | | |  |  |  |
| Explain the smoking policy | | |  |  |  |
| Explain fire evacuation procedures and show location of appliances and signage and advise of designated Fire Marshall(s) | | |  |  |  |
| Advise of designated first aider and where they are based | | |  |  |  |
| Explain any specific health & safety requirements including safe systems of work | | |  |  | . |
| Ensure new starter has completed and returned any emergency contacts form and bank details forms. | | |  |  |  |
| Explain working times and pattern, time recording and flexi (if applicable) | | |  |  |  |
| Explain Annual Leave policies and process for booking annual leave | | |  |  |  |
| Explain any Absence and Special Leave Policies, including details of who to notify if they are ill | | |  |  |  |
| Give an overview of the organisation, the service/team and its work, including where the new starters job role fits | | |  |  |  |
| Advise of any dates of one-to-one/supervision/team meetings and explain the organisation’s arrangements for keeping new starters informed (e.g., newsletters, briefings) | | |  |  |  |

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| --- | --- | --- | --- |
| **Within first two weeks (continued)** | **Manager**  **Signature** | **Employee**  **Signature** | **Date** |
| Explain relevant computer systems and applications, e.g., email, intranet, SharePoint, printing etc, where relevant |  |  |  |
| Show new starter where to find HR policies and procedures |  |  |  |
| Explain salary slip |  |  |  |
| Explain any local procedure manuals and policies |  |  |  |
| Explain work standards expected and ensure that the new starter fulfils any statutory induction requirements within their professional area |  |  |  |
| Reinforce commitment to help with any problems |  |  |  |
| Ensure the employee is aware of recognised Trade Unions |  |  |  |

I confirm that I have read and am satisfied that I have understood the information provided within this guide and, where required, sought guidance and clarification.

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Employee Signature** |  | **Line Manager Signature** |  | **Date Induction Completed** |  |