Induction checklist

The list below provides guidance on what new staff need to know and outlines typical things that need to be covered during your Induction. It can be discussed and used in conjunction with your line manager.

Not all items may be applicable to all staff; similarly there may be other activities or information that need to be added to the list. You may want to agree with your manager on this. If your department has its own Induction Checklist then this may be used in place of this form.

Please sign off and date each item when the activity has been completed or when you have the required information. When completed, copies should be kept both by you and your line manager.

Name_____ **Department_____**

Manager_____

1. Introductions

	Date Completed
• Meeting your line manager / supervisor	
• Meeting your induction colleague / buddy (if relevant)	
• Meeting your head of department / director	
• Meeting your departmental administrator / manager (if relevant)	
• Meeting your departmental colleagues	
• Meeting your mentor (if relevant)	

2. Orientation

	Date Completed
• Staff University Card	
• Work area(s) and equipment, e.g. photocopier, stationery	
• Tea and coffee area / water dispenser / common room	
• Cloakrooms	
• Pigeon hole and mail collection point	
• Notice boards	
• Car parking areas	
• Map of university	
• Tour of campus and / or appropriate areas	
• Catering on campus – cafes, vending machines, bars etc	
• Campus facilities – shops, banking, sports centre, health centre etc	
• Additional information for international staff	

• Additional information for staff new to York	

3. Other basic information

	Date completed
• Passport / confirmation of right to work in the UK (if not already done)	
• Employee questionnaire returned to HR services (if not already done)	
• P45 (if applicable) and bank details to payroll (if not already done)	
• First pay day / contact point for issues re tax / pay	
• Pension scheme and eligibility	
• MyView	
• Rewards Extra	

4. Introduction to the induction process

	Date completed
• Outline of the induction process with agreed induction programme	
• New starter's guide to induction	
• Explanation of probationary process and its link to induction	
• Probation review form containing agreed standards and objectives	
• Identification and agreement of training needs to support induction	

5. Departmental operations and procedures

	Date completed
• Departmental objectives, function and plan	
• Departmental organisation chart / staff lists	
• Departmental calendar of events	
• Departmental and team meetings	
• Departmental communications, including website	
• Social activities and networks in department	
• Finance procedures and regulations, e.g. purchasing, expenses, travel	
• Administrative systems, e.g. booking rooms, ordering stationery	
• Learning resources and staff handbooks (academic, research, support)	
• Hours of work, time keeping and flexi-time	
• Meal breaks and cover arrangements	
• Part time working (if applicable)	
• Annual leave and booking procedure	
• Sick leave procedure and other absences	
• Access to equipment for personal use, e.g. telephone, email	
• Issues of confidentiality	
• Access to technical / administrative / secretarial support	

6. Job role

	Date Completed
• Clarify job description (key duties, outputs, contacts, standards of work)	
• How role fits into departmental and University objectives	

7. University

	Date Completed
• Introduction to University of York website	
• University directory	
• University plan – 2009 - 2019	
• Staff opinion survey results	
• Campus expansion information	
• York Extra	
• Small ads service	
• The University of York Magazine	
• Other University communications	
• Yorkshare VLE	
• Library membership	
• Joining a college	
• Other sports and social facilities	

8. Health and safety

	Date Completed
• Introduction to local first aider	
• Workplace fire evacuation procedure (alarm, muster point etc)	
• Completion of online Fire Safety package	
• University accident / incident reporting procedure	
• Working out of hours procedure and alarm codes	
• No smoking policy	
• Workstation assessment / online DSE training and eye test information	
• Role of Occupational Health	

9. IT and other equipment

	Date Completed
• How to use PC / rules of use, e.g. login, username and password	
• Shared drives and directory structures	
• Approved software / hardware	
• Email access and usage	
• Use of calendar (Google, Sun etc)	
• Working remotely / access from outside the University	
• Telephony, e.g. facility codes, voicemail	

10. Training and development

	Date Completed
• Identification of training needs (see section 4)	
• Creation of personal development plan	
• Accessing training and development opportunities through POD	
• Accessing other opportunities, e.g. IT, Health and Safety	
• Central induction programme attendance	
• Other centrally held induction programmes, e.g. new research staff	
• Awareness of University's statutory and compliance provision	
• Completion of online Diversity in the Workplace package	
• Completion of online Data Protection including information legislation package	
• Staff Development Resource Centre	

11. Other information

	Date Completed
• Sustainability in transport, e.g. car share scheme, cycle scheme	
• Harassment contact network	
• Trade Union membership	
• Maternity / paternity / adoption leave	
• Flexible working policy	
• Promotions / regrading procedure	
• Policy on alcohol	
• CiC - Counselling and Employee Assistance Service	