# Induction checklist

This lists important information for new staff and typical things that need to be covered in your induction. You and your line manager should work through this list together.

* not all items apply to all staff
* there may be other activities / information that need to be added by your manager
* when completed, you and your manager should keep copies

**Managers**: if your candidate has not yet started, consider how you can begin welcoming them to the University. See <https://www.york.ac.uk/admin/hr/recruitment/appointment/keeping-in-touch/>

|  |  |
| --- | --- |
| Name |  |
| Department / section |  |
| Line manager |  |
| Induction colleague |  |
| Mentor (academic roles) |  |

## Pre-Induction

|  |  |
| --- | --- |
|  | **Date completed** |
| Passport / confirmation of right to work in the UK shown to HR  (to be completed immediately on first day or where possible, before the start date) |  |

## Introductions

|  |  |
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|  | **Date completed** |
| Meet your line manager / supervisor |  |
| Meet your induction colleague / buddy (if assigned one) |  |
| Meet your Head of Department |  |
| Meet your team members |  |
| Meet your departmental administrator / manager (if relevant) |  |
| Meet your mentor (if relevant) |  |

## Documentation

|  |  |
| --- | --- |
|  | **Date completed** |
| Log in and get to know [MyView](https://myview.york.ac.uk/dashboard/dashboard-ui/index.html#/landing) |  |
| [Look at / select optional staff benefits](https://www.york.ac.uk/admin/hr/browse/employee-benefits) |  |

## Health and safety

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| --- | --- |
|  | **Date completed** |
| Meet local first aider |  |
| Meet local fire safety officer |  |
| [Fire evacuation procedure (alarm, muster point, etc)](https://www.york.ac.uk/admin/hsas/safetynet/Fire/fire_safety.htm) |  |
| Complete [online Introduction to Fire Safety package](https://york-ac.csod.com/DeepLink/ProcessRedirect.aspx?module=transcript) |  |
| [Accident / incident reporting procedure](http://www.york.ac.uk/admin/hsas/safetynet/Accidents/incident_reporting.htm) |  |
| Working out of hours: procedure and alarm codes |  |
| No smoking policy |  |
| Workstation assessment / online DSE training and eye test information |  |
| [Role of Occupational Health](https://www.york.ac.uk/admin/hr/browse/health-and-well-being/occupational-health) |  |
| [Health and well-being resources](https://www.york.ac.uk/admin/hr/browse/health-and-well-being/well@york) |  |
| Health Assured - [Counselling and Employee Assistance Programme](https://www.york.ac.uk/admin/hr/browse/health-and-well-being/employee-assistance) (EAP) |  |

## IT and other equipment

|  |  |
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|  | **Date completed** |
| How to use PC; rules of use; login, username and password |  |
| [Shared drives and directory structures](http://www.york.ac.uk/it-services/filestore/) |  |
| [Approved software](http://www.york.ac.uk/it-services/software/) / hardware |  |
| [Gmail access and usage](http://www.york.ac.uk/it-services/services/email/) |  |
| [Use of Google calendar](http://www.york.ac.uk/it-services/services/calendar/) |  |
| [Working remotely / access from outside the University](http://www.york.ac.uk/it-services/work-off-campus/) |  |
| [Telephones: facility codes, voicemail](https://www.york.ac.uk/it-services/unified-communications/) |  |
| Complete the [online Information Security Awareness](https://york-ac.csod.com/DeepLink/ProcessRedirect.aspx?module=transcript) |  |
| [Complete the online GDPR module](https://york-ac.csod.com/ui/lms-learning-details/app/course/e03ed048-c02d-4fe8-b0c1-99c715926d95) |  |
| [Complete the online Digital Accessibility tutorial](https://york-ac.csod.com/ui/lms-learning-details/app/course/b02a041d-8fc9-48ac-ae5d-91138693a428) |  |

## The induction process

|  |  |
| --- | --- |
|  | **Date completed** |
| Outline of the induction process with agreed induction programme |  |
| Read [new starter’s guide to induction](https://www.york.ac.uk/admin/hr/new-starters/induction/new-staff/orientation) / [researchers induction guidance](https://www.york.ac.uk/staff/research/research-staff-induction/) |  |
| Understand probationary process and its link to induction |  |
| Probation review form introduced and first part completed |  |
| Identification and agreement of training needs to support induction |  |
| Booked onto a [Central Induction](https://york-ac.csod.com/DeepLink/ProcessRedirect.aspx?module=lodetails&lo=a1020d8b-1280-46ee-8705-f9085ec1adec) event |  |

## Orientation

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|  | **Date completed** |
| Work areas / equipment |  |
| Tea and coffee area, water dispenser, common room |  |
| Toilets |  |
| Work area security arrangements, door codes |  |
| Staff ID card collected and functioning |  |
| Pigeon hole and mail collection point |  |
| Notice boards |  |
| Car parking areas |  |
| Map of university |  |
| Tour of campus and relevant areas |  |
| Catering on campus: cafes, Cucina, vending machines, bars, etc. |  |
| Campus facilities: shops, banking, sports centre, health centre |  |
| Additional information for [staff relocating from outside of the UK](https://www.york.ac.uk/admin/hr/new-starters/international-staff-relocation-handbook.pdf) |  |
| Additional information for [staff relocating from within the UK](https://www.york.ac.uk/admin/hr/new-starters/uk-staff-relocation-handbook.pdf) |  |

## Equality and diversity

|  |  |
| --- | --- |
|  | **Date completed** |
| Completion of [online Diversity in the Workplace package](https://york-ac.csod.com/LMS/LoDetails/DetailsLo.aspx?loid=a174a9fa-2101-4a5e-b030-41cc424ce381) |  |
| Completion of online [Unconscious Bias Awareness package](https://york-ac.csod.com/LMS/LoDetails/DetailsLo.aspx?loid=cb3034ce-de18-4ac5-98db-5e6e5bcd0d11) |  |
| Review the [Equality, diversity](http://www.york.ac.uk/admin/eo/) and inclusion pages   * policies and guidance * Equality Staff Networks * Departmental Equality Champions * the University approach and activities around Gender Equality * Good Practice Guidance |  |
| Review the [Disability Support for Staff](https://www.york.ac.uk/staff/support/disability/) pages |  |
| Discuss any disability support with line manager |  |
| Direct the member of staff to the [University of Sanctuary webpage](https://www.york.ac.uk/about/sanctuary/) |  |

## Departmental operations and procedures

|  |  |
| --- | --- |
|  | **Date completed** |
| Departmental objectives, function and plan |  |
| Departmental organisation chart / staff lists |  |
| Departmental events calendar |  |
| Departmental / team meetings |  |
| Departmental communications (including website) |  |
| Social activities and networks in department |  |
| Admin systems: booking rooms, ordering stationery, etc. |  |
| Learning resources and staff handbooks |  |
| Hours of work, timekeeping 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 |  |
| Induction on relevant sustainability issues within the role (if the department participates in the [Green Impact project](http://www.york.ac.uk/about/sustainability/get-involved/greenimpact/)) |  |

## University

|  |  |
| --- | --- |
|  | **Date completed** |
| Introduction to [University of York website](http://www.york.ac.uk/) |  |
| University [directory](http://www.york.ac.uk/about/contact/) |  |
| [University plan – 2014 - 2020](http://www.york.ac.uk/about/mission-strategies/) |  |
| [Staff opinion survey results](https://www.york.ac.uk/staff/working/survey/) |  |
| Staff Digest e-newsletter |  |
| [Staff homepage](https://www.york.ac.uk/staff/) |  |
| [Yorkshare VLE](https://vle.york.ac.uk/webapps/portal/execute/tabs/tabAction?tab_tab_group_id=_736_1) (if applicable) |  |
| [Library](http://www.york.ac.uk/library/) membership |  |
| [Joining a college](http://www.york.ac.uk/colleges/) |  |
| Other [sports](https://www.york-sport.com/) and [social](http://www.york.ac.uk/news-and-events/events/) facilities |  |
| [Personal Relationships policy](https://www.york.ac.uk/admin/hr/policies/hr-procedures/personal-relationships/policy/) |  |

## Learning and development

|  |  |
| --- | --- |
|  | **Date completed** |
| Identify training needs |  |
| [Create personal development plan](https://www.york.ac.uk/admin/hr/university-careers/taking-control/making-a-career-plan) |  |
| [Accessing learning and development opportunities through HR](https://www.york.ac.uk/admin/hr/browse/learning-and-development) |  |
| Accessing other opportunities, e.g. [IT](https://york-ac.csod.com/DeepLink/ProcessRedirect.aspx?module=browsetraining&sid=534), [Health and Safety](https://york-ac.csod.com/DeepLink/ProcessRedirect.aspx?module=browsetraining&sid=538), [DECS](https://york-ac.csod.com/DeepLink/ProcessRedirect.aspx?module=browsetraining&sid=555) |  |
| [Awareness of University’s statutory and compliance provision](https://www.york.ac.uk/admin/hr/browse/learning-and-development/statutory-and-compliance) |  |
| Likely to claim travel expenses?  Complete the short [E-learning course](https://york-ac.csod.com/LMS/LoDetails/DetailsLo.aspx?loid=d244e942-ed06-46e6-b441-8a8afefab0f9#t=1) |  |
|  |  |

## Financial information

|  |  |
| --- | --- |
|  | **Date completed** |
| [Payroll](https://www.york.ac.uk/staff/finance/payroll/) Salaries, casual workers, overtime, absence reporting |  |
| P45 (If applicable) and bank details sent to Payroll |  |
| Payday; contact points for issues regarding National Insurance & Tax |  |
| [Download the full financial information checklist](https://www.york.ac.uk/admin/hr/new-starters/induction/new-staff/financial-info-checklist.docx) (this is role-dependent) |  |
| [Sign up for your digital payslip](https://www.york.ac.uk/staff/finance/payroll/digital-payslips-project/) |  |

## Other information

|  |  |
| --- | --- |
|  | **Date completed** |
| Links to University-wide [policies and procedures](https://www.york.ac.uk/admin/hr/browse/policies) |  |
| University information on [ethics and integrity](https://www.york.ac.uk/staff/research/governance/research-integrity-and-ethics/) |  |
| [Trade Union](https://www.york.ac.uk/admin/hr/browse/employee-relations/structures) membership |  |

## What to do next

**Once complete, sign and date below and return to your line manager**

|  |  |
| --- | --- |
| Name of post holder |  |
| Signature and date |  |
| Name of line manager |  |
| Signature and date |  |