# **OUTLINE OF A JOB INDUCTION CHECKLIST**

A checklist should ensure that both the new employee and their line manager know what has or has not been covered at any given time.

They both need a copy which should be kept up to date, so they can follow what is happening. It can also act as a reminder of anything that needs particular attention.

While a checklist is helpful, it should not turn the induction into a tick-box exercise. It should be the responsibility of both management and the new starter to ensure all items are properly covered.

The checklist is often drawn up by the employer’s HR department in consultation with other staff involved, such as a safety officer, line manager/supervisor, employee representative and training officer.

This is a template an employer can adapt or develop to meet its needs.

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| **Name of Employee:** | **Job Title:** |
|  |  |
| **Start Date:** | **Date Induction Completed:**  (with signature of new starter) |
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| **Before Start Date** | **Carried Out By** | **Date** | **Notes** |
| Gather all Personal Information. Including National Insurance Details, Security Card, Details of any adjustments need to be implemented for the new employee. Information of Size for any PPE/Uniforms |  |  |  |
| Details of any employee representation, including any trade union membership. |  |  |  |
| Ensure all equipment is obtained/in place |  |  |  |
| Order any required PPE/Uniform |  |  |  |
| Prepare Contract |  |  |  |
| Book any essentially required training Course |  |  |  |
| Book Induction time in other colleagues/managers diaries |  |  |  |
| **First day** | **Carried Out By** | **Date** | **Notes** |
| Welcomed by |  |  |  |
| Show new employee where they will be working |  |  |  |
| Introduce them to their line manager, colleagues, including their ‘buddy’ and senior managers. |  |  |  |
| Show new employee rest of organisation including facilities. |  |  |  |
| The organisation’s commitment to being an equal opportunities employer. |  |  |  |
| Outline health & safety Requirements such: as Location of First Aid Box and who is the First Aider and where to find them. Working safely (VDU, Trips slips Etc), Fire Procedures, Muster point. |  |  |  |
| **First week** | **Carried Out By** | **Date** | **Notes** |
| ***Introduction to***  ***the company*** |  |  |  |
| Who’s who, how it works and what it produces |  |  |  |
| Future plans and  development |  |  |  |
| Brief history |  |  |  |
| ***New employee’s job*** |  |  |  |
| Explain it fully, how it fits in the organisation and work practices |  |  |  |
| Outline expected performance and how it will be assessed |  |  |  |
| Training – explain what, when & how |  |  |  |
| Possible opportunities for future development |  |  |  |
| ***New employee’s terms and conditions of employment***  Run through… |  |  |  |
| Them to ensure they understand and have them in writing |  |  |  |
| This includes details of any probationary period |  |  |  |
| … and hours, breaks, holidays and when they will get paid |  |  |  |
| Pension information |  |  |  |
| The organisation’s important rules on:   * job performance * discipline * absence, including because of illness and sick pay * complaints against staff, such as bullying and harassment   Also say where more details can be found |  |  |  |
| Other important rules such as use of the company internet, email, and phones |  |  |  |
| Periods of notice |  |  |  |
| Maternity/paternity/  parental leave/shared parental provisions |  |  |  |
| Details such as dress code, parking, smoking and the canteen |  |  |  |
| Who to speak to if there are any questions or problems |  |  |  |
| Complete documentation on new employee’s appointment for their personal file to be kept securely. |  |  |  |
| ***Health & safety***  Detailed training on health & safety in the organisation |  |  |  |

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| **First month** | **Carried Out By** | **Date** | **Notes** |
| Towards the end of four weeks, an informal meeting with the line manager to assess how the new starter is adjusting to their role, and whether they have any coaching or training needs, or other concerns. |  |  |  |
| **At Three Months** | **Carried Out By** | **Date** | **Notes** |
| Review with the line manager how the new starter is settling in and performing  This is also an opportunity to pinpoint any development needs, set timescales for achieving them and adjust work targets if required. |  |  |  |
| **At Six Months** | **Carried Out By** | **Date** | **Notes** |
| If the new employee is on probation, then it is decision time – will they stay or go?  If they are staying, it is time for the line manager to look to the next six months, any new work objectives, and any experience, coaching or training needs. |  |  |  |
| **At Twelve Months** | **Carried Out By** | **Date** | **Notes** |
| Ask the employee for feedback on their induction – what worked well?  What could be improved? |  |  |  |