

Induction checklist

Please complete the information below with your line manager. There may be items listed on the checklist, which are not applicable to you or your job – if this is the case, please initial “N/A” for “not applicable”.

Name of Employee:

Job Title:

Team:

Line Manager’s Name:

**Probationary Period Review
(At 1 month) Date:**

**Probationary Period Review
(At 3 months) Date:**

**Probationary Period Review
(At 5 months) Date:**

Note: Please refer to the Probationary Procedure for New Entrants to North Yorkshire County Council for guidance/forms for Probation Period Reviews (to be found on the Staff Information website via Recruitment, Induction and Probation).

A COPY OF THIS FORM SHOULD BE KEPT ON THE INDIVIDUALS PERSONAL FILE

The checklist

The first day

Workplace Familiarisation

	Who (named)	Signed	Date
• Introduction to immediate colleagues / working relationships	Line Manager or nominated colleague		
• Layout of working area and building (amenities / tour of premises)			
• Issue of door security codes or keys			
• Use of equipment / supplies (eg stationery)			
• Catering facilities (canteen, tea/coffee making facilities)			
• Car and bicycle parking (designated areas / parking permit)			
• Making and receiving personal telephone calls			
• Smoke free Policy outlined			
• Telephone system / telephone salutation			
• Cloakroom and toilet facilities (including lockers if applicable)			
• Induction film and booklet			

Forms for Completion / Conditions of Employment Explained

	Who (named)	Signed	Date
• Conditions of Service / ID Card	Line Manager		
• P45 (handed in) or P46 (request from payroll)			
• Hours of work			
• Absence Notification (reporting arrangements/ self certifications/ sick pay)			
• Flexi system / Issue of Flexi card (where applicable)			
• Annual leave (entitlement) / Leave card			

Safe Working Practices

	Who (named)	Signed	Date
• Fire procedures (fire drill and fire alarm)	Line Manager or nominated colleague with input from the Safety Risk Advisor where required		
• Fire extinguishers (location of fire fighting equipment / use of extinguishers)			
• Location of Fire exits			
• Fire Evacuation Officer (who)			
• First Aider / appointed person (who and where based)			
• First aid box (location/ room)			
• Accident Book / Incident forms (notification)			
• Manual Handling			

Signed:Employee

Signed:(Manager)

Date:

Within the first week

Safe Working Practices

	Who (named)	Signed	Date
• Health & Safety responsibilities (employee)	Line Manager or nominated colleague with input from the Safety Risk Advisor where required		
• Risk Assessment (explain safety hazards – general/particular)			
• Safe use of equipment			
• COSHH (chemical hazards / health risk dangerous substances)			
• Security (premises)			
• Housekeeping (clear gangways)			
• Corporate Health & Safety Policy			
• Health & Safety Representatives			
• Safety Rules (no smoking / behaviour e.g. horse play, practical jokes / protective clothing – where applicable)			
• Personal safety, including lone working, violence & aggression (where applicable)			

Forms for completion/ Conditions of Employment explained

	Who (named)	Signed	Date
• Contract of Employment (hours/breaks/notice/written statement)	Line manager		
• Pension Guide / Scheme / other benefits			
• Employee Benefits website at www.everybody-benefits.co.uk			
• Pay and Reward Booklet			
• Register for MyView access, (ePayslips, changes to various personal details, attendance management, mileage claims etc)			
• Car user details and Car Allowance Claim Forms (where applicable)			
• Issue of identification card			
• Declaration of convictions, arrests, charges & summons			

Initial tasks to be carried out by employees in relation to Corporate Information Systems at induction.

	Who (named)	Signed	Date
• Register on e-Learning Zone. Carry out Equalities, H&S, Safeguarding training.	Line Manager or nominated colleague		
• Undertake Employee Awareness Courses – Data Protection, Freedom Of Information & Information Security (GDPR)			
• Set up school email address. (Explaining about 500Mb maximum account size and archiving procedure.)			
• Access SharePoint.			
• Set up security questions for Password Self-Provisioning.			

The Job

	Who (named)	Signed	Date
• Job Role / Duties discussed (job description and person specification)	Line Manager		
• Standards of Service expected			

• Communication (records / team meetings / e-mails/ etc)			
• Confidentiality / Data Protection (including access to files)			
• Reporting and recording information			
• Computer system / Code of Practice / main applications			
• Mobile phones policy / billing for personal calls (if applicable)			
• Internet usage policy			
• Email policy			

Directorate, Unit and Customer Information

	Who (named)	Signed	Date
• Corporate Structure	Senior Manager and Line Manager		
• Structure of Directorate			
• Service Plan, Aims/Objectives/Targets			
• Team Objectives			
• Corporate Priorities			
• Access to sources of information (eg files, manuals, websites)			
• Access to customer specific information			
• Key contacts: customers and services			
• Working Groups			
• Notice Boards and Newsletters and Key Messages			
• Intranet			
• Role of the Manager			

Signed: Employee

Signed: (Manager)

Date:

Within first month

Policies and Procedures explained in detail and are available from the Staff Information website on the Intranet

Who (named)	Signed	Date
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• Staff Information website			
• Behaviour and Skills Framework			
• Appraisal and consultation (including probation)			
• Attendance Management Policy and Procedure			
• Developing Performance and Capability Policy and Procedure			
• Code of Conduct / Declaration of interests	Line Manager or nominated colleague		
• Disciplinary Policy and Procedure			
• Resolving Issues at Work			
• Flexible Working Policy			
• Equality Policy Statements (Corporate and Directorate)			
• Health, Safety & Welfare (role / representatives)			
• Health and Wellbeing Service			
• HIV, Alcohol, Drugs and Substance Misuse			
• Staff Care Network			
• Data Protection/Information Security Policy and Procedures			
• Local policies and procedures			
• Trade Union Membership / Recognition			

Signed: Employee

Signed: (Manager)

Date:

Within first 3 months

Development

Who (named)	Signed	Date
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<ul style="list-style-type: none"> • Learning and Development Policy, Identification of training needs 	Line Manager or nominated colleague		
<ul style="list-style-type: none"> • Personal Development Plan 			
<ul style="list-style-type: none"> • Basic skills training 			
<ul style="list-style-type: none"> • Time off for Training Policy 			
<ul style="list-style-type: none"> • Performance Appraisal – guidance and training 			
<ul style="list-style-type: none"> • Investors in People Standard 			
<ul style="list-style-type: none"> • Basic ICT Package • Customer Care • Data Protection • e- induction • Equality & Diversity • Freedom of Information and Information Security • Health and Safety • Information Security • Safeguarding • Service specific learning 			
<ul style="list-style-type: none"> • Directorate Workforce Development 			

Signed: (Employee)

Signed: (Manager)

Date:

Comments by Employee

Comments by Line Manager/Nominated Person

Signature of Employee: Date:

Signature of Line Manager: Date:

The employee and the line manager should both keep a copy of the signed checklist (electronic or paper), and the original should be forwarded to be kept on the employee's Personnel File.

INDUCTION - USEFUL CONTACTS

HR SERVICES:

For your local teams, see **Staff Information** for contact details.

Staff Information Website:

- Via the intranet – click on **Staff Information** on the right of the homepage
- Via the internet – <http://intranet.northyorks.gov.uk>

PAYROLL SERVICES:

A list of Payroll contacts can be found on the Intranet under **Finance and Central Services - Payroll - Payroll Contact List**

General enquiries: 01609 532576 or e-mail: payroll@northyorks.gov.uk

PENSIONS:

Local Government Pension Scheme: North Yorkshire Pension Fund – General Enquiries – 01609 532567 / 532698 / 535880
pensions@northyorks.gov.uk

Teachers Pension Agency: The Guide **Teachers' Pensions: A Guide to the Teachers' Pension Scheme** is available to all teachers, who can obtain copies or any other information about the scheme by calling 0845 6066166 or visiting the website www.teacherspensions.co.uk

TRADE UNIONS:

The Trade Union recognised by North Yorkshire County Council is Unison. Contact – unison@northyorks.gov.uk

ICT SERVICES:

Help Desk: 01609 532020 ICT.Helpdesk@northyorks.gov.uk

HEALTH AND SAFETY RISK MANAGEMENT:

Contact details for your Directorate Health and Safety Risk Manager can be found on the Intranet under **Health and Safety – Contact Us**.

INDUCTION RELATED LINKS:**Learning Zone**

This is a one stop shop for anything to do with training, learning, and development within North Yorkshire County Council.

You can access it via the Intranet by clicking on **Staff Information – Training and Development – Learning Zone** or by clicking on **Learning Zone** in the Computer Systems area of the Intranet homepage.

USEFUL CONTACTS (SPACE FOR YOU TO MAKE YOUR OWN LIST)

Name and role	Location	Telephone no.	E-mail address